



**JENNIFER  
ORECHWA**

**GET  
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Booked**

**A No-Nonsense  
Marketing Playbook for  
WELLNESS PRACTICES  
AND MED SPAS**

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# Dedication

*To my kids: Remember that the shortcut is rarely the way. Do the deeper work. The right people will notice. No matter what you choose to do, do it with excellence. When you know who you are, what you value and who you're called to serve, everything becomes clear. To my husband Walter; Thank you for always believing in me and expanding my definition of what's possible. I love you so much.*

*To my parents: While I always said my sister was the best gift you ever gave me, showing me what resilience looks like is a close second. Thank you for teaching me that taking action and solving problems is so much better than complaining about them. Thank you for showing me that setbacks are part of the path... not a sign you're on the wrong one.*

*To the Salt Marketing community: Together, we are impacting so many wellness entrepreneurs. Thank you for inspiring each other, challenging me and forever asking "what if...?"!*

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# FREE GIFT FOR MY READERS

As a way of saying thank you for purchasing my book, I wanted to offer the opportunity for real insight into your unique online presence and the opportunities ahead with Salt Marketing's FREE Online Presence Index.

This high-level audit reveals your wellness practice's online visibility and effectiveness, including factors such as website performance, SEO, local search presence, and conversion gaps. It highlights what's working, what's missing, and where opportunities exist to attract more qualified patients.

**You can get your FREE gift by going here:**

**<https://saltmarketing.co/online-presence-index/>**



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# Introduction

## Why Marketing Feels Hard, And How This Book Will Help

**M**arketing your wellness practice or med spa feels overwhelming, inconsistent, and ineffective, even though you're great at what you do. You have the education, expertise, and reputation for excellence, yet what they did not teach you in school is creating an ongoing visibility and consistency problem that impedes the growth and success of your practice.

Have you ever stared at your phone late at night trying to come up with something, *anything*, to post after a hectic day of treating clients or patients? You're not alone. Maybe you've delegated marketing to your front desk manager because she's "good with Instagram." Maybe you've spent thousands on ads, only to wonder where the so-called leads went, assuming they were real people to begin with. Maybe you've tried a little bit of everything because you were told you had to be everywhere — and you're understandably exhausted.

I hear you. I know from firsthand experience that wellness practitioners and med spa owners are among the most passionate, heart-driven professionals in the world. You chose your profession because you wanted to help people *feel better, look better, and live better*. But somewhere along the way, it started to feel like you needed a second degree in marketing, tech, and maybe even psychology just to keep up. You didn't establish your practice only to spend your nights learning SEO or building sales funnels; you did it to make a positive impact on the clients or patients seeking your knowledge, precision, and care.

And yet, here you are: Googling “how to get more patients,” scrolling through marketing advice more aligned with e-commerce brands than local med spas, and wondering why some practices seem to have a waitlist while your practice rides the revenue rollercoaster in a seemingly endless loop. It’s not that you’re doing anything wrong; you’re simply playing a game without the right playbook.

The truth? Marketing feels like a steep uphill climb because without a well-defined strategy at its foundation, it yields scattered results. To make matters worse, med spas and wellness practitioners confront a unique challenge: they’re not selling a tangible product like shoes or software, but a promise of transformation, trust, and hope. People schedule wellness appointments, aesthetics or consults not out of boredom but in a sincere effort to feel different, better, and whole.

That’s why marketing in this space is so nuanced. As the provider of a deeply personal service, you can’t fake authenticity, outspend corporate franchises on ads, or rely on ever-changing weekly trends. Instead, attracting your ideal clients and patients requires marketing that *feels* like you and reflects your heart as well as your expertise. Long before someone books an appointment, your marketing must establish trust because people do business with people they know, like, and trust.

Unfortunately, most “marketing advice” precludes these critical elements. It may work for tech startups or retail brands, but not frazzled practitioners balancing patient care, staffing, operations, and compliance — all while squeezing in a minute to post on Instagram.

Do any of the following sound familiar?

- You attempt to post on all social media platforms because someone told you you should.
- You post when you have time, but you’re never sure what to say.
- You run a promo and see a little bump in calls...but it doesn’t last.

- You hire a marketing agency, and they treat you like just another account instead of a partner.

## **Deep Breath: You Don't Have to Turn Into a Marketer to Get Results**

Now that we've identified the problem, I want you to relax and take a deep breath because there is a solution that will change everything.

Marketing doesn't have to be a separate part of your job that competes with client and patient care. When done right, marketing *is* care. Every time you post educational content, answer a common client question, or appear on video to talk about the difference between BOTOX® and fillers, you're helping your potential new clients and patients make informed choices about their health and wellness. Before they even call you or set foot into your office, you're guiding them in an act of service, not engaging in "marketing fluff."

And when your marketing flows naturally from the way you already care for people, aligned with your mission, values, and expertise, it stops feeling forced and starts feeling fulfilling. That's the transformation I envision for you as you move through this book.

## **It's Not You. It's the Noise**

Over the past decade, the wellness industry has exploded. With new med spas and wellness practices popping up everywhere, it is becoming increasingly competitive. Combined with the online noise, including social media platforms, prospective clients and patients are more overwhelmed than ever. However, I want you to understand a critical distinction: you're not competing with every practice in your city; you're competing with *confusion*.

Bombarded with differing approaches and various personas, your potential new clients don't know who to trust.

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Why is your approach better than the clinic down the street?

What treatment suits them best?

What problem do they need to solve?

If clients don't understand what they need and what distinguishes you from another wellness practice or med spa in addressing that need effectively, they won't choose you.

If your marketing is inconsistent, they'll forget you.

If your message isn't clear, they won't trust you.

Every month you delay building a system is another month you'll spend reinventing the wheel, riding the revenue rollercoaster, and hoping the next post or promo finally works.

That's where an effective, consistent marketing strategy comes in.

When you learn how to communicate clearly and position yourself as a trusted guide instead of just another option, you cut through the noise and become the obvious choice. That's what this book is here to help you do.

## ***Get Found, Get Booked* Is the Playbook You've Been Missing**

In this book, I'm going to show you how to market your med spa or wellness practice without becoming a full-time marketer. *Get Found, Get Booked* will guide you through building a clear, repeatable system that makes it easier for your ideal clients and patients to find you, trust you, book with you, refer others to you, and return to you again and again — while you enjoy consistent marketing that no longer drains you.

You won't need to chase constantly evolving trends or duct-tape together random tactics. And you'll no longer sacrifice your nights to study SEO, create funnels, or reinvent your messaging every month.

Instead, you'll construct what most med spas and wellness practices lack: a marketing system designed for your kind of business.

## **The Moment I Realized There Had to Be a Better Way**

When I started Salt Marketing, I did not intend to build another traditional agency. After years of working with small businesses, including marketing my own, I swore I'd never do it the "typical" way again. I had seen too many brilliant practitioners with incredible skill and heart invest in tactics that never moved the needle: Facebook ads without compelling messaging, beautiful websites that failed to convert, and social media posting with no strategy beyond "try to stay visible." They had plenty of hustle. What they needed was a system that respected their time, honored their voice, and transformed marketing from chaos into clarity.

That's where I conceived *The Salted Edge*: a step-by-step framework rooted in *StoryBrand* messaging, inbound marketing, automation, and smart measurement, built around *you*, the practitioner, not around the easiest deliverables for a digital marketing agency.

This framework transforms marketing from scattered to strategic. It does not chase trends or overcomplicate your efforts but establishes a foundation that actually works. Why? Because it focuses on you, the practitioner, and honors your voice, expertise, and time.

## **What Makes The Salted Edge Framework Different?**

The Salted Edge Framework materialized from one simple belief: when your marketing aligns with your mission, it becomes effortless and effective.

Each part of the system builds on the other:

1. **Attract:** Create clear, magnetic messaging that cuts through the noise and draws your ideal clients to you.

2. **Convert:** Guide those prospects to a confident “yes” through trust-building systems and intentional communication.
3. **Create Raving Fans:** Deliver such an incredible experience that clients can’t help but talk about you.
4. **Automate:** Build systems and automations that save time, reduce chaos, and keep your marketing running consistently.
5. **Measure & Scale:** Use real-time data to see what’s working, what’s not, and where to grow next.

Every chapter of this book will walk you through these steps, with examples, templates, and workbook exercises designed for med spa and wellness owners just like you.

You’ll finally have a marketing strategy that feels *doable*, not daunting; one that grows with your practice instead of holding it back.

## **The Benefits You’ll Receive When Marketing Becomes Transparent and Strategic**

When your marketing aligns with your mission, it moves from feeling forced to feeling fulfilling, because it becomes an extension of you and the care you offer.

You can expect several changes when you implement a real system:

- You stop guessing what to post and start communicating with transparency
- You attract clients who value your expertise (not bargain hunters chasing discounts)
- Your website becomes a conversion tool, not an online brochure
- Your calendar fills more predictably, without constant promos

- Your team feels focused because your consistent messaging
- You spend less time “doing marketing” and more time serving patients and clients

## **Proof: Why Some Practices Get Booked While Others Burn Out**

You’ve probably noticed it: one practice has a waitlist, steady new patient flow, and seemingly effortless content, while another practice in the same geographic area struggles to stay consistent, constantly runs promotions, and starts over every month, despite having top-notch providers.

In my experience, talent and budget are rarely the defining factors. It’s about structure.

The practices that get found and get booked simply operate with messaging, systems, and follow-up that develop trust long before the appointment.

## **Emotional Burnout Is Real: Don’t Wait Until It’s Too Late**

Have you ever compared yourself to other practices on Instagram that show up with perfect lighting, flawless videos, and hundreds of comments? I know how deflating it feels.

Most marketing books overlook the emotional consequences a busy practitioner suffers when trying to reach and attract potential new clients online. It’s easy to believe they have a secret you don’t, but more often than not, the difference has nothing to do with talent and everything to do with consistency and systems. Behind the scenes, your competitors work from a structure while you reinvent the wheel every month.

Marketing burnout is real. You’re likely depleted from the endless posting, the constant pressure to “show up,” and the trial-and-error with little feedback.

I want you to know that you are *not* the problem. It's the lack of marketing systems and processes that support your goals. The longer you wait to implement a framework that brings structure, strategy and sanity back into your marketing, the greater your exhaustion and the risk to growing your practice and increasing your revenue. Stop spinning your wheels and start reading now.

## **How To Get The Most Out Of This Book**

I wrote this book to provide you with a clear, repeatable marketing system — a framework that integrates with your schedule, not complicates it. If you follow the framework on these pages, you will stop relying on random tactics and start creating steady momentum: more visibility, trust, bookings, and predictable growth.

You don't need an advanced degree in marketing. You just need the right playbook.

## **Read, Implement, Succeed**

In the chapters ahead, you'll learn how to implement a doable, ethical, and sustainable marketing system that reflects your expertise and heart.

You'll discover how to:

Identify and attract ideal clients who align with your mission

Create powerful messaging using StoryBrand principles so you become the obvious choice

Design a website that converts and guides clients toward a confident “yes”

Use automation to save time and keep your client experience seamless

Leverage social media and email naturally and consistently

Measure what matters to determine what's working and where to grow next

By the end, you'll have a system you can maintain without burning out or micromanaging. If you're ready to stop guessing, cut through the static, and grow your practice with clarity, let's get started.

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# Part I

The Reality of Marketing a Wellness Business

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# Chapter One

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## The Chaos Trap

### Why "Doing Everything" Is Disrupting Your Marketing & Stalling Your Success

If you've continued reading beyond the introduction, chances are you have already lived through what I call *The Chaos Trap*. In my experience with my Salt Marketing clients, it usually starts innocently enough, prompted by a slow month, a dip in new patient leads, and a well-meaning friend saying, "You really need to be doing TikTok."

From there, the path often leads to joining a marketing webinar that promised "ten patients a day in ten days" or hiring an agency that swore they had *the secret* for med spas and wellness practices.

Maybe you've tried boosting a random Instagram post, sending a last-minute discount email, creating a new service special because "everyone else was doing one," or posting three reels a week because someone told you, "Consistency is key."

And what is the result of all of that extra effort? Nothing sticks. Some months you're slammed, other months you're staring at an empty schedule wondering where everyone went. If that sounds familiar, take a deep breath because you are in excellent company.

Welcome to the reality for most med spa and wellness practitioners: smart, skilled, heart-centered clinicians struggling to operate inside a marketing system that was never built for them.

You didn't choose the wellness profession because you wanted to become a part-time marketer, yet here you are, trying to juggle marketing tactics like flaming swords while simultaneously running your practice, serving patients, managing staff, keeping up with industry trends, and — *oh yes* — maintaining a fulfilling life outside of work.

Let's name this phenomenon appropriately: *Marketing chaos* — and it's costing you in more ways than one. I'm not just talking about money, but your time, confidence, energy, peace, and ability to grow in a purposeful, aligned manner.

Before we talk about how to fix it, and I promise, we will, let's take a closer look at how well-meaning practitioners end up trapped in chaos, why it feels impossible to get out, and the simple shift that changes everything.

## **Why Wellness Practices Get Mired in Marketing Chaos**

There are three major reasons practitioners fall into the Chaos Trap and stay there longer than they should.

### **Reason #1**

Your training taught you how to care for clients and patients, not engage in marketing. No medical school, chiropractic college, nursing program, PA track, aesthetics academy, or certification course teaches the kind of marketing that builds a sustainable practice. Instead, you learned how to diagnose and treat patients with care by listening and personalizing protocols.

What you *didn't* learn was how to understand the patient journey or create irresistible messaging. No one taught you how to run successful email campaigns or automate follow-ups. You knew you needed a website, but no one showed you how to optimize it for SEO and conversion. And you certainly weren't given the tools to train your staff to support or measure your marketing ROI across multiple channels.

And yet, the moment you open your doors, you're suddenly hit with the expectation to do all of that *and more*. The gap between your clinical knowledge and the need for a strategic marketing strategy creates chaos.

### **Reason #2**

You're surrounded by cookie-cutter marketing advice dispensed by people who have never stepped foot into a wellness practice. They lack a thorough understanding of HIPAA rules or patient decision cycles, and have no clue concerning the emotional, financial, and relational considerations that guide a patient to say "yes."

So, you buy generic marketing strategies that fail to speak to your ideal client, and when they inevitably fail, you assume marketing simply "doesn't work." While it's not the fault of you or your practice, you're employing the wrong strategy.

### **Reason #3**

You're operating with tactics, not within a system. I get it: tactics are tempting because they make you feel as if you're making progress by keeping you busy and generating lots of marketing activity for you and your team. But tactics cannot create sustainable growth on their own. When you string together isolated actions without a framework or a strategy, the result is noise: significant effort, minimal payoff.

This is the crossroads where many wellness owners give up entirely or continue burning out while pushing harder and harder. But there's another way, one that's simple and scalable, and it begins with understanding the system that shifts med spas and wellness practices from chaos to clarity.

## **Introducing the Scalable Simplicity System**

When we first started Salt Marketing, I quickly realized that wellness practitioners didn't need *more* marketing, but a *marketing system* — a simple, repeatable, and proven path for growth that works, regardless of the platforms you use or fluctuations in the market.

After working with hundreds of practitioners across med spas, functional medicine, primary care, therapy, and wellness clinics, the pattern became crystal clear:

Every successful practice follows the same five stages, in the same order, and in a continuous loop of refinement. These five stages became the foundation of The Scalable Simplicity System; a framework designed specifically for wellness businesses:

1. Scramble
2. Stabilize
3. Systematize
4. Scale
5. Soar

## Scalable Simplicity System

Salt Marketing helps wellness practitioners gain more clients in less time...without tech headaches or hiring an agency, thanks to The Salted Edge.



1 Scramble	2 Stabilize	3 Systematize	4 Scale	5 Soar
<p>You're hustling hard but spinning your wheels. Marketing is random, inconsistent, and overly reliant on promos or one-off tactics. You've tried everything but nothing feels like it's working.</p>	<p>You start laying the groundwork. You begin understanding what actually moves the needle and stop wasting time on things that don't. You define your ideal client and their journey.</p>	<p>You're building the backbone of a scalable, sustainable marketing machine. Automations, tech tools, and processes are starting to work in sync – without constant supervision.</p>	<p>Now that the systems are in place, it's time to turn up the volume. You're creating high-value content, tapping into your community, getting referrals, and optimizing what already works.</p>	<p>Marketing feels easy. You've built a repeatable, proven system that brings in new clients, keeps current ones engaged, and gives you the freedom to focus on what you love.</p>
<p><b>Milestones</b></p> <ul style="list-style-type: none"> <li>Relying on random promotions, discounts or word-of-mouth to bring in clients.</li> <li>No clear, consistent marketing message or a defined target audience.</li> <li>Results are unpredictable, and you feel frustrated and overwhelmed.</li> </ul>	<p><b>Milestones</b></p> <ul style="list-style-type: none"> <li>Identified an Ideal Client Avatar and clarified core Brand Messaging.</li> <li>Capturing leads with a simple list-builder and following up with them.</li> <li>Consistently publishing content on at least one platform each week.</li> </ul>	<p><b>Milestones</b></p> <ul style="list-style-type: none"> <li>Automated lead capture, booking, and client follow-up systems.</li> <li>Documented marketing campaigns that can be repeated without starting from scratch.</li> <li>Tracking a few key marketing metrics and reviewing them regularly.</li> </ul>	<p><b>Milestones</b></p> <ul style="list-style-type: none"> <li>Successfully running growth campaigns like webinars, workshops, or memberships.</li> <li>Team supports the daily marketing tasks.</li> <li>Making data-driven decisions and continuously optimizing marketing systems.</li> </ul>	<p><b>Milestones</b></p> <ul style="list-style-type: none"> <li>Marketing runs predictably with minimal owner involvement.</li> <li>Marketing focus is on strategic opportunities – partnerships, advanced offers, or expansion.</li> <li>Advanced tracking and forecasting in place to confidently plan for growth.</li> </ul>
<p><b>Action steps</b></p> <ul style="list-style-type: none"> <li>Clarify your messaging and niche.</li> <li>Create a simple, repeatable list builder and nurture path.</li> <li>Choose a content platform and commit to it weekly.</li> </ul>	<p><b>Action steps</b></p> <ul style="list-style-type: none"> <li>Automate your lead capture and follow-up.</li> <li>Create repeatable marketing campaigns and document them.</li> <li>Build simple reporting to track what's working.</li> </ul>	<p><b>Action steps</b></p> <ul style="list-style-type: none"> <li>Optimize your best-performing systems.</li> <li>Build a marketing team or partner with a high-touch agency.</li> <li>Launch a growth campaign with confidence.</li> </ul>	<p><b>Action steps</b></p> <ul style="list-style-type: none"> <li>Delegate strategic oversight with confidence.</li> <li>Build advanced tracking and forecasting.</li> <li>Innovate your next-level offers or expansion.</li> </ul>	<p><b>Action steps</b></p> <ul style="list-style-type: none"> <li>Systematize innovation and testing.</li> <li>Strengthen your thought leadership and brand authority.</li> <li>Optimize client lifetime value with advanced segmentation.</li> </ul>

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Whether you're a solo injector, chiropractor, or hormone clinic practitioner, or the director of a multi-seven-figure med spa with multiple providers, these stages help you identify where you are, what you're missing, and most importantly, what to do next.

We're going to walk through each one, because the moment you understand this path, marketing stops feeling chaotic and starts feeling like something you can actually control.

### **Stage One: The Scramble**

If you're like most practitioners, your marketing probably feels a little bit like a frantic dash from one thing to the next. One day you're posting on Instagram because someone told you should be posting daily, and the next day you're sending a last-minute promotion because the schedule looks thin. The day after that, you're Googling "how to get more med spa clients" at 10 p.m., clicking through articles you don't have the energy to implement.

That's The Scramble.

It is the inevitable result of *reactive* marketing instead of intentional marketing — when you're responding to dips in revenue or slow weeks instead of guiding your growth with purpose. It arises when every month feels like a surprise, but not in the fun, celebratory way. Some weeks you're booked solid; others, you're wondering if everyone coordinated to take a vacation at the exact same time.

In Scramble, everything hinges on you. If you don't post, nothing goes out. If you don't follow up, no one does. If you don't remind the team...well, you probably already know how that ends.

You're spinning so many plates that "marketing" becomes this vague, foggy cloud that follows you around everywhere you go: on your drive home, during appointments, and even when you're trying to fall asleep.

And the messaging? If you're honest, it's a mix of whatever words you grabbed in the moment that felt right or that you saw someone else using.

A caption dashed off between patients. A promo thrown together on Canva that still looks like a Canva template. A sales page that sounded good at the time but doesn't really sound like *you* anymore.

When you're in Scramble mode, everything feels like you're throwing spaghetti at the wall and hoping desperately that something sticks.

The most ironic part? None of it is a reflection of your capability. In fact, it's generally the opposite: Scramble happens because you care deeply about your business. You want it to grow so you can help more people. That's why you're trying so hard to make the right moves, yet the more you try, the more chaotic things feel. Although effort fuels the Scramble, clarity remains the missing guide.

*And clarity is the one factor you absolutely must have before anything else can work.*

It begins with knowing who you serve. It's not everyone; it's the specific people who are the best fit for what you do. Getting your messaging right means identifying what your clients and patients *need* — not what you want to sell — but what they are actually searching for. Clarity is kind. It communicates how you help in language that makes your ideal client feel understood, not overwhelmed. When you get this right, you demonstrate why someone should choose you, including your unique method, philosophy, and care.

Most importantly, you need clarity about what happens next: the simple, repeatable path that turns a curious follower into a booked client.

Once that clarity snaps into place, Scramble loosens its grip. You can feel the shift physically as your shoulders drop, the knot in your stomach relaxes, and the pressure lifts like fog when sunshine pierces through the atmosphere. Now let me share a little secret no one divulges to practitioners: Scramble can be the shortest stage in your entire business *if* you allow it.

In my experience, wellness practices stay mired in Scramble far longer than necessary because no one handed them a map. They have no idea what the next stage is supposed to look like, or how simple the transition can be once they finally have a clear foundation.

The moment you learn where to place your attention, and what you can safely ignore, you begin to stabilize and see results that make sense. You stop reacting and start leading. And marketing transitions from being a Scramble to a reliable system you can trust.

### **Stage Two: Stabilize**

If Scramble makes you feel like you're constantly running behind your own business, Stabilize feels like the first deep breath you've taken in months. It's the stage where the noise quiets down just enough for you to hear yourself think. You begin to notice, almost to your surprise, that not everything requires your immediate attention. There's finally a sense of direction, something sturdier than what you had before.

The Stabilize stage is often marked by a single moment of realization, one I hear from practitioners all the time: "Oh. So, *this* is what actually moves the needle." It's not a new tactic, a fancy funnel, a viral reel, a paid ad, or a perfect logo. It's the moment you stop trying to do everything and start doing the *right* things.

At this point, your marketing begins to align with your business — not the other way around. You stop contorting yourself to fit someone else's blueprint, and instead begin building an authentic, manageable, and sustainable framework.

Next, something subtle but powerful begins to occur: instead of scrambling for content ideas, you start developing a clear point of view that enables you to build a relationship with your audience. Your voice becomes recognizable and your message becomes memorable. Now you have the ability to put some energy into consistency, *not* perfection, daily posting, or endless content. Simple consistency removes the guesswork from your marketing and replaces it with a strategic means to an end.

When you start to feel as if you're steering your marketing rather than chasing it, you're ready for what comes next.

Finally, at this stage, lead capture comes into play, where you turn visitors into engaged participants. At Salt Marketing, we call this a list builder or a lead magnet, and it can take the form of a guide, a checklist, a quiz, a video, or even an informative podcast. The most critical characteristic is that it's something you would have wanted when you first embarked on your own wellness journey. It doesn't have to be elaborate. It just needs to answer a question your ideal patient is already asking. Because when someone engages with your content, your relationship with them officially begins.

### **Stage Three: Systematize**

By the time you reach Stage Three of the Scalable Simplicity System, your business feels lighter, steadier, and more predictable. You're no longer waking up each week wondering what to say in your marketing, or where to show up. Attracting new clients or patients starts to take on a reliable rhythm and structure.

If Stabilize focuses on clarity, Systematize focuses on confidence. It's the moment you stop building your marketing on adrenaline and start building it on intention. You're no longer reacting to every slow day or descending into panic mode every time you see empty time slots on your calendar.

Instead, you're noticing patterns in terms of what your audience responds to. You're understanding your own voice, message, and strengths.

And from that awareness, you cultivate the ability to create systems — decisions you only have to make once.

It starts small with a few simple automations or your first set of repeatable campaigns. You have a weekly content routine and a centralized place with live ideas, assets, and messaging. Little by little, the chaos that used to define your marketing gives way to flow.

You begin to see where technology can support you, not overwhelm you. You find that automation isn't cold or impersonal; it's a tool that frees your time and treats every lead with care. This is when you get to discover the relief of having an email sequence that nurtures patients without you having to remember to send anything. And you create a library of reusable content that enables brand consistency and saves you from having to reinvent the wheel every time your team posts.

Perhaps for the first time since you started your business, you're not carrying all of this alone, because Systematize is also the stage where delegating becomes possible, and sometimes even exciting. You can delegate because you finally have a structure and a plan *to* delegate. You're not tossing tasks to your team with a hope and a prayer that they figure it out. You're giving them a clear direction, with boundaries, expectations and tools they can use.

At the Systematize stage, your business no longer depends on your stamina and begins to rely on your systems. And with an established structure — smoothly functioning automations, predictable and purposeful content, documented processes, and an empowered team, you're ready for a stage that used to feel like a pipe dream.

Now your practice shifts from steady to soaring.

### **Stage Four: Scale**

If the first three stages create your marketing engine, Stage Four enables you to finally turn the key and feel the power underneath you. It's the first time you look at your business and realize, *Oh... this is what growth is supposed to feel like!*

Scale is the stage most practitioners imagine when they daydream about “next level growth.” It's the point where your practice begins to stretch, expand, and open new doors that once seemed unreachable. Workshops, webinars, memberships, collaborations, events, new team members, and even the thought of opening a second location feel less like a fantasy and more like a strategic possibility.

Scale invites you to abandon doing *more* in favor of doing *more of what works*.

And that's only possible because you've already laid the foundation in Systematize. Without that clarity and structure, Scaling represents a more expensive version of chaos rather than sustainable growth. You've probably seen this for yourself: a practice that launches everything all at once, burns out their team, overextends their budget, and ends up more stressed than ever.

You cannot scale chaos.

If there's even one part of your business still entangled in Scramble, whether it's unclear messaging, inconsistent content, no lead capture, or no follow-up process, it will follow you into Scale like unchecked baggage.

Scale magnifies whatever foundation you've built: strong or shaky.

That's why the work you did in Stabilize and Systematize matters so deeply. Without those stages, Scale becomes a house of cards. With them, it becomes the most energizing phase of your business, where you get to innovate, experiment, and expand without sacrificing your peace or your sanity.


For the first time, you're steering the ship, which fills you with a new sense of confidence that prepares you for the final stage, where your business becomes self-sustaining, not just successful. Scaling means trusting your team with profound responsibilities because you've created systems that teach them how to win.

This stage elicits the realization that the patients on your schedule are no longer random, but ideal fits who already feel connected to your brand. You now possess the ability to reach more people by cultivating your personal brand; for example, launching a workshop with the knowledge that your email sequence, nurture system, and follow-up automation will support it flawlessly.

When you arrive at this stage, you offer discounts or promotions that feel aligned with your marketing strategy, and not like desperate, reactive measures. Now you can raise your prices because your demand, data, and confidence support the decision.

## Success Tracker

**HOW TO USE THIS**  
Think of this tracker as your marketing growth map. You'll start by identifying your current stage, then move through clear checkpoints as you level up. You can move at your own pace—there's no race here. Just steady, sustainable progress.



1 Scramble	2 Stabilize	3 Systematize	4 Scale	5 Soar
<p>Marketing is random. Growth is unpredictable. You're overwhelmed, exhausted and frustrated</p> <p><b>Check Off When Complete:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I've clarified who my ideal client is</li> <li><input type="checkbox"/> I've defined a core marketing message</li> <li><input type="checkbox"/> I've chosen one content platform (social/email/etc.)</li> <li><input type="checkbox"/> I've shown up consistently at least 2 weeks in a row</li> <li><input type="checkbox"/> I've watched the "Attract" module in the Masterclass</li> <li><input type="checkbox"/> I've introduced myself in the community</li> </ul>	<p>You've built clarity and consistency. Now let's start capturing and nurturing leads</p> <p><b>Check Off When Complete:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I have a simple lead magnet or list builder in place</li> <li><input type="checkbox"/> I've connected my list builder to an automated email follow-up</li> <li><input type="checkbox"/> I've posted original or templated content at least weekly</li> <li><input type="checkbox"/> I've tracked which posts/emails are performing best</li> <li><input type="checkbox"/> I've joined at least one live coaching call</li> </ul>	<p>Your marketing has structure. Let's scale it with automation + repeatable campaigns.</p> <p><b>Check Off When Complete:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I've implemented at least one automation from the library</li> <li><input type="checkbox"/> I've documented one repeatable campaign or promotion</li> <li><input type="checkbox"/> I'm using a tracking dashboard to view metrics weekly</li> <li><input type="checkbox"/> I've created an SOP or system for weekly content</li> <li><input type="checkbox"/> I've begun outsourcing or templating tasks</li> </ul>	<p>You're running effective campaigns and making data-backed decisions</p> <p><b>Check Off When Complete:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I've run a live growth campaign (challenge, webinar, workshop, etc.)</li> <li><input type="checkbox"/> I've reviewed and repurposed high-performing content</li> <li><input type="checkbox"/> I've tested a new offer or updated an existing one</li> <li><input type="checkbox"/> I've collaborated with or cross-promoted another business</li> <li><input type="checkbox"/> I've optimized my most successful automation or campaign</li> </ul>	<p>Your marketing machine runs without you. Now it's time to expand your reach and impact.</p> <p><b>Check Off When Complete:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I've built advanced client segments and personalized offers (etc.)</li> <li><input type="checkbox"/> I've created or refined a thought leadership strategy (guest posts, podcast, speaking, etc.)</li> <li><input type="checkbox"/> I've delegated most marketing activities</li> <li><input type="checkbox"/> I've created a calendar to innovate</li> <li><input type="checkbox"/> I'm planning an expansion (membership, location, product or service line)</li> </ul>
<p><b>REFLECTION</b> My current stage: My biggest win this month: One challenge I overcame: My next best step that's going to move the needle is:</p>				

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## Stage Five: Soar

There's a moment in every well-run wellness practice where the founder looks around and thinks, almost with disbelief, *"This is what I hoped it would feel like."* Don't get me wrong: I'm not talking about perfection, being "done," or reaching some mythical finish line. I'm referring to ease and predictability and stepping into your role as a practitioner *and* visionary; someone who leads with intention instead of urgency.

At this stage, everything you built in the first four stages comes together to support your freedom. It's your reward for choosing clarity over chaos, systems over stress, and intention over reaction.

It's the moment when your marketing, team, patient experience, and operations all work in sync, at last affording you the ability to expand without carrying the weight of the entire business on your back.

The owner of a soaring med spa now spends her mornings leading team huddles, not putting out fires. She reviews her metrics dashboard once a week and sees steady growth, month after month, without the emotional rollercoaster she used to brace for. Her team knows exactly how leads flow through the business, so no one wonders what happens next or who's supposed to do what.

Patients arrive educated and excited because the automated nurture sequences gave them everything they needed before they ever booked. Every consultation feels easier because they already align with patient expectations. Every conversion feels more natural because you have developed trust long before the appointment.

Once you have reached the Soar stage, your involvement becomes *high-level* instead of *high-pressure*. In this stage, you can focus on higher aspirations like thought leadership, writing, speaking, podcast guesting or hosting, and contributing to industry conversations with your unique expertise. Your focus can shift to advanced ways to serve your clients and patients through efforts that add depth in addition to revenue, such as memberships, continuums of care, and signature programs.

You'll also find that you have the time to connect with your community and local businesses to engage in cross-promotions and collaborations that expand your reach without increasing your workload.

In my work with clients, I have found that the reward that excites so many practice owners the most is the ability to develop a world-class team, invest in people, empower new leaders, and cultivate a culture of growth. With these pieces in place, you have the ability to innovate — to test new ideas without destabilizing the business.

Finally, you can start to think about next steps, like opening a second location, seeking investors, or researching M&A opportunities because your systems and foundation are strong enough to support it.



## Chapter 1 Salt Shaker: Step Out of the Chaos Trap

Before you move on, pause for a moment and reflect. Ask yourself honestly:

- Which parts of my marketing feel reactive instead of intentional?
- Where am I scrambling because I lack clarity, not motivation?
- Which stage of the Scalable Simplicity System best describes where I am right now?



*Scan this QR code to download a PDF of my Scalable Simplicity System as well as your own Success Tracker here!*

I am not asking you to fix everything today, nor am I telling you to create a new tactic, platform, or promotion. I created these questions to help you cultivate awareness, because clarification always comes before change.

As you continue to Chapter 2, remember that marketing stops feeling chaotic the moment you stop trying to do everything and start doing the right things, in the right order.

Now let's explore the unique challenges wellness practitioners face when it comes to strategic marketing.

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# Chapter Two

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## The Unique Challenges of Wellness Marketing

If you've been in the wellness field for any amount of time, you already know that marketing a practice is different. Most small businesses can run a sale, put out a few ads, post consistently, and see a decent bump in interest, if not revenue. But med spas and wellness practices live in a completely different ecosystem shaped by trust, safety, personal vulnerability, and long-term relationships.

Since the rules differ dramatically, so does the path to growth. In this chapter, we're going to explore why, because once you understand the psychology of wellness buyers, the frustration you've felt around "marketing chaos" makes sense. You'll learn why your ad campaigns didn't convert, why your competitors seem to experience growth (despite loud but not necessarily deep marketing), and why your most loyal clients seem to take forever to convert.

The uniqueness of wellness demands a unique marketing strategy.

### **Why "High Trust" Changes Everything**

Customers in most industries ask themselves a simple question: "*Do I want this?*" Contrast that with wellness clients and patients who pose a more profoundly personal query: "*Can I trust you?*"

A potential new wellness client is not buying a shirt, candle, or latte. They're allowing someone they don't yet know deep insight into their health, body, confidence, hormones, and aging process. That level of vulnerability requires a level of trust no catchy ad or clever offer can circumvent. The intensely personal nature of wellness explains why the typical "small business marketing playbook" so often fails practitioners. It assumes buyers already feel safe enough to take action. However, wellness practitioners and med spas must earn safety slowly, thoughtfully, and consistently.

Your patients and clients evaluate you long before they ever book. They're listening to how you talk about their concerns, watching how you present yourself, absorbing how you educate, and looking for signs that you truly understand what they're experiencing. Your voice, presence, and philosophy matter just as much as your services.

This is why so many practitioners like you feel stuck. People tell you to "post more," "do more," and "be everywhere," yet none of those suggestions address the core issue, which is the trust gap at the beginning of every wellness relationship. Once you recognize that trust is the true currency of wellness decisions, everything else clicks into place.

## **Education and Sales: A Dance of Distinction**

Most practitioners naturally lean toward educating. You love to explain, teach, guide, and give context because you're wired that way. Your instincts are right concerning your profession: education builds trust and trust compels action.

However, many practices unintentionally get stuck at the "explaining" stage, pouring out value, answering every question, posting reels and infographics, sending helpful emails — and still hear crickets. People learn from them, thank them, and even compliment their content, but fail to take the next step.

I don't mean to imply that you're giving away too much. This problem illustrates that you're not *guiding* them enough because information alone rarely catalyzes action. What does? Clarity. Sequence. Support. Your prospective clients need you to connect the dots for them so they can digest not only *what* the information means, but *why it matters*, *what's at stake*, and *what to do next*. They need you to help them interpret their symptoms, goals, or frustrations, and then offer them a clear pathway toward transformation.

At this juncture, the balance between educator and guide becomes paramount. When your content teaches your prospective clients and patients enough to build confidence *and* guides them toward a simple, low-friction next step, you no longer feel like you're "doing a lot of marketing" without results. Your audience begins moving toward you naturally, because you've created a sense of partnership rather than pressure.

## **The Buyer's Journey Explained: Understanding the Marketing Funnel**

When marketers refer to a "funnel," they're simply describing the stages people move through on their way to becoming paying clients. At the top of the funnel are people who are just becoming aware they have a problem, such as someone with recurring back pain who isn't sure what's causing it or who can help. In the middle of the funnel are people who are actively considering their options: they're researching physical therapists, reading reviews, and comparing approaches. At the bottom of the funnel are people who are ready to choose you as a provider because they trust you, understand your process, and feel confident you can help them.

Each of these stages requires a different message and approach: education for the top, clarity and reassurance for the middle, and a simple invitation to book for the bottom. In a minute, we'll talk about why discounts work best *after* you have already educated someone; a loyalty perk makes sense to a person who trusts you, but it won't convince a stranger whose back pain remains a mystery.

## The Critical Timing of Discounts, Urgency, and Gimmicks in the Buyer's Journey

One of the most common frustrations I hear from med spa owners is: “Why doesn’t my promotion work the way I expected? Other people are doing it; why isn’t it working for me?”

The reason is simple: in wellness, if someone doesn’t know you yet, *not really*, a discount will not create trust. In fact, an attempted top-of-funnel discount can elicit more skepticism in the eyes of your prospects, not less.

Picture someone who’s never had BOTOX®, or someone exploring hormone therapy for the first time. They’re not thinking, “*Ooh, save \$50!*” They’re thinking:

- “Will this work for me?”
- “Is it safe?”
- “Will I look natural?”
- “Do they understand my concerns?”
- “How do I know I can trust them?”

A discount can’t answer those questions. Only education can.

Rest assured, there is a point where things shift and discounts absolutely *can* work. Once an educated client feels safe, the dynamics change. A loyal BOTOX® patient of eighteen months doesn’t need convincing that injections work or that you know what you’re doing. She already believes in the service. She trusts *you*. At that point, a dollars-off promotion or a “VIP only” limited-time perk comes across as appreciation, not persuasion.

This is an example of bottom-of-funnel, retention-driven marketing. And in wellness, that’s where discounts actually shine. Educate first. Build trust second. Reward loyalty third. Reverse the order, and everything falls apart.

Follow the order, and you'll see conversions increase effortlessly, entirely aligned with how wellness clients want to buy.

## **Your Clients Seek the *Right* Option, Not the Cheapest Option**

Generic marketing advice does not apply to wellness due to the nature of the decision itself. When people invest in a hormone replacement program, a peptide protocol, a series of laser sessions, or a comprehensive functional medicine program, they're not choosing a commodity, a simple exchange of services for their money. They *are* choosing a relationship, and more importantly, to see a future version of themselves. They're opting for someone who will walk with them through their health, confidence, or longevity journey.

For these reasons, they're comparing trust signals, not price tags. Your ideal clients and patients want to know who will:

- Take the time to understand them
- Guide them without judgment
- Explain things in a way that makes sense
- Listen with intention
- Support them when progress feels slow
- Be the practitioner they can rely on for consistent, safe care

When you market with this awareness by speaking directly to the experience your clients want to have, you attract higher-quality clients who stay longer and refer more often. You stop competing on price and prioritize trust. You discard the juggling of random tactics in favor of building a sustainable system. And you no longer guess about what to say and begin communicating with clarity, confidence, and authority.

## Why Standard “Small Business” Marketing Advice Falls Short

Traditional marketing approaches assume buyers make fast decisions based on simple desires, yet that’s not how wellness works. Your prospective clients:

- Take longer to decide
- Research more thoroughly
- Compare practitioners as much as they compare services
- Worry about choosing the wrong provider
- Approach new treatments cautiously
- Want education *and* reassurance
- Need clarity and guidance before they commit

Wellness has never been, and will never be, a transactional purchase.

Now you know why you’ve likely felt frustrated by tactics that “should” work because other industries have success with them. But in wellness, you’re dealing with a longer, more emotional, and more layered buyer’s journey. If you’re exclusively employing short-term tactics in the form of a few ads, a few promotions, and some sporadic social media posts, you’re speaking to a fraction of the buying cycle.

Once you understand that your marketing is a journey that earns trust gradually and intentionally, everything becomes easier. You’ll strengthen your messaging, deepen your content, and make clearer offers, supported by your automation. And your team will finally understand how to alleviate the burden you’ve been carrying on your shoulders.

## Why Who You Are Matters More Than You Realize

In a high-trust industry, expertise is only one part of the equation. Beyond that, people want to know who you are, what you believe, how you think, and how you'll care for them. They want to see your philosophy woven through your content, feel your conviction, and sense your empathy.

Many practitioners underestimate the significance of this truth until they start sharing their story, approach, "why," and patient philosophy. Suddenly, the transition from potential new client or patient to *paying* client or patient accelerates because they feel connected, understood, and seen before they ever meet you.

It's the beating heart of wellness marketing, when your message conveys your values and your content mirrors your dedication. It then reflects in the experience your clients and patients have and appears in the Google reviews they publish. When your presence feels safe and consistent, people select you long before they schedule a consultation.

And once they choose you, they stay. Not because of a promotion or trend but because they feel guided, supported, and cared for, the exact need they sought to fulfill in the first place.

Now that we've explored the realities of the wellness industry, you can probably see why chaos seems to reign supreme for most practitioners using strategies devised for businesses that do not require the same high level of trust. They're applying tactics designed for quick transactions to a process that requires patience, education, and emotional connection.

Unknown to you, you've probably been playing by the wrong playbook.

Take heart, I have good and simple news: once you start marketing according to the truth of wellness buying behavior, you can expect a game-changer. Confusion cedes to strategy, pressure eases, the system crystallizes, and your results become more predictable. Your business finally expands in the ways you always imagined it could.

## Where Do We Go From Here?

Now that you understand that the wellness landscape does not respond to generic, cookie-cutter methods and instead requires a unique brand of marketing — and why trust is the foundation of everything — we can move into the phase that will transform how you show up. In the next chapter, you'll learn how to create a marketing system that guides and reassures people, positions you as the trusted expert, and gently leads them toward becoming loyal, long-term clients or patients.

Wellness marketing does not speak louder, yet runs much deeper, rooted in trustworthiness. In this chapter, we've explained the rules; in Chapter 3, we'll create a system that actually works.



## Chapter 2 Salt Shaker: Shifting from Tactics to Trust

Before you move on, take a moment to shake out what doesn't belong in your wellness marketing, so you can keep what does.

Ask yourself:

- Where in my marketing have I been asking people to buy before they trust?
- Am I educating my audience... but leaving them unsure of what to do next?
- Which part of my current marketing speaks to *price* instead of *partnership*?
- If I were a first-time client, what would I need to feel safe choosing me?

JENNIFER ORECHWA

Remember, in wellness, trust always comes before transactions. Marketing works best when it mirrors the care, patience, and guidance you already give your clients or patients inside the treatment room.

As you head into Chapter 3, let go of the small business marketing rules that never applied to you in the first place. You're not here to scream above the online noise or push a hard sell. You're here to guide.

In Chapter 3, I'll show you how to build a system that guides your ideal clients and patients calmly, consistently, and with integrity.

# Chapter Three

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## The Missing System

If you're like most wellness entrepreneurs, you probably feel overwhelmed by the multiple marketing options available, from answer and search engine optimization (AEO & SEO) and social media to email and online reviews. By the time most practitioners ask for help, they're usually frustrated and exhausted because their random approach to digital marketing (post a little here, post a little there) has failed to attract their ideal clients and increase bookings.

Can you relate? If so, it is because you do not yet have a system — a structured, repeatable, and measurable method of aligning all that activity. In this chapter, we'll discuss *The Salted Edge Framework*, a five-part marketing system designed specifically for wellness businesses. It's the missing link that will connect your marketing efforts into a cohesive growth engine.

Imagine following a *clear marketing roadmap* that tells you precisely how to attract new prospects, convert them into clients, delight those clients so much they sing your praises, streamline your processes, and continually improve your results.

Enter The Salted Edge Framework. This proprietary system structures your marketing efforts (say goodbye to scattershot tactics), creates repeatable campaigns (stop reinventing the wheel every month), and provides measurable metrics (no more guessing which efforts pay off).

Rather than conceiving one-off ideas, you're implementing a cycle of strategies that build on each other to form a repeatable, proven system. This approach brings in new clients, keeps current ones engaged, and frees you to focus on what you do best.

At a high level, the Salted Edge Framework consists of five interconnected phases: **Attract**, **Convert**, **Create Raving Fans**, **Automate**, and **Measure to Scale**. Each phase represents a critical function in your wellness practice's marketing machine.

**Here's a quick overview:**

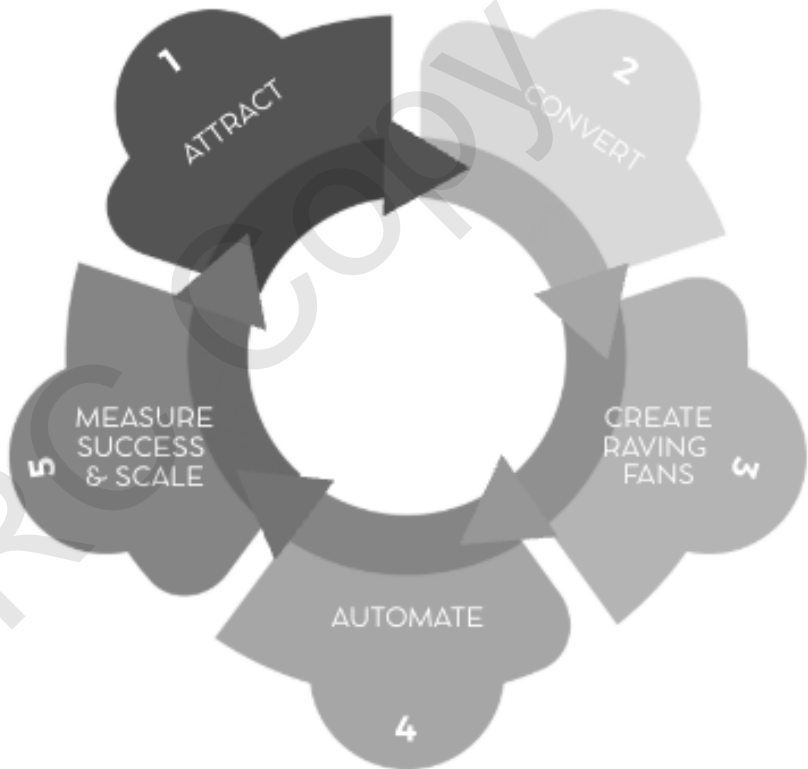
1. **Attract** – Draw your ideal audience to you and make them aware of your services. This phase focuses on getting the right people to notice you, so you can start building trust with them.
2. **Convert** – Turn those interested prospects into actual paying clients by nurturing leads and optimizing your booking or sales process to turn *eyeballs turn into revenue*.
3. **Create Raving Fans** – Delight your clients and turn them into loyal advocates by delivering exceptional value and service. Happy patients will return for more *and* refer others, effectively doing your marketing for you
4. **Automate** – Streamline and automate your marketing and client follow-up processes. By using simple systems such as email follow-ups, scheduling tools, etc., you "*rinse and repeat*" *successful campaigns* and free up your time.
5. **Measure to Scale** – Track your results and use data to continuously improve. By diving into key metrics, you can see what's working, what to leverage, and what to let go of, allowing you to scale up your success confidently.

Although each of these five phases serves a distinct purpose, they must work in harmony for the engine (your marketing) to run smoothly.

In a visual diagram, you might depict the first three phases – Attract, Convert, and Create Raving Fans – as a cycle that turns strangers into happy customers and advocates. Surrounding that cycle, Automate and Measure function as ongoing processes: automation keeps the cycle running with less manual effort, and measurement provides the feedback to fuel growth.

*Figure 3.1* illustrates how a new lead enters the system at Attract and eventually comes full circle as a raving fan who attracts further leads – all underpinned by automation and data insights.

### The Salted Edge Marketing Framework



By the end of this chapter, you'll understand how each piece contributes to a comprehensive marketing plan tailored for a wellness practice like yours.

Now, let's take a closer look at each phase of the Salted Edge Framework and how it applies to your wellness business.

## **Attract: Draw In Your Ideal Clients**

The first job of any marketing system is to Attract the right people – your ideal prospective clients or patients. In the Salted Edge Framework, the *Attract* phase proactively drives *qualified* new leads and builds awareness of your practice. This phase seeks to attract the *right* people, the ones best suited to your services who will likely become happy, long-term clients.

Attracting qualified leads begins with clarity surrounding your *Ideal Customer Profile* (sometimes called your Ideal Patient Profile in healthcare). Before you spend another dollar or minute on marketing, you must define the exact prospects you want to reach and determine what will resonate with them.

In fact, the first milestone in creating a sustainable system is identifying your Ideal Customer Profile and clarifying your core brand messaging. When you articulate your target client's demographics, needs, fears, and desires, then shape your message to speak to them, you set the stage for focused, effective marketing.

Build your message and content around your ideal client. Imagine you run a holistic wellness clinic focusing on stress relief. Your ideal client might be a busy professional in her 40s who struggles with anxiety. With this knowledge, you can create content that speaks to her, for example, blog articles about managing work stress or social media posts featuring quick breathing exercises.

Your marketing will attract her because it addresses her real problems in an authentic, helpful way. This approach beats generic, "anyone and everyone" advertising every time.

You need methods to understand your perfect client and ways to bring them to you so you can create connections, authority, and trust.

In practice, that means developing educational, valuable content and campaigns that naturally draw your ideal audience in.

For a med spa or wellness center, high impact *Attract* strategies often include optimizing your online presence for local search.

For example, you must infuse your website with relevant keywords — the terms your potential clients type into their search bar when seeking your services — to rank on page one of Google and appear in search engine results page (SERP) features like AI Overview and People Also Ask.

Relevant keywords could include “massage therapy in [Your City]” or “best med spa for BOTOX® near me.”



Additionally, maintaining an updated Google Business Profile with high-quality photos of your med spa or wellness practice and staff, and current info helps new people discover you on Google Maps or search. With these SEO efforts, you can make yourself visible to those actively seeking your services.

## Show Up to Stand Out

Content marketing is a powerful magnet for attracting your ideal clients and patients. Therefore, prioritize implementing systems that enable you to share valuable content consistently in the form of weekly blog posts, short videos, or social media tips that address your audience's common questions and interests.

Consistency is key because posting once and disappearing won't build momentum. Whether you choose Instagram, Facebook, email newsletters, or another platform, commit to showing up regularly. At Salt Marketing, we prompt our Salted Edge members to choose one primary content platform and appear on it consistently.

By delivering useful tips on skincare, nutrition, mindfulness, or whatever aligns with your practice, you establish yourself as a trusted authority. Over time, a library of content also boosts your SEO and attracts new eyes continually.

Another effective effort is leveraging social proof and word-of-mouth. Even in the Attract phase, your happy clients can help draw in more business. Encourage those first few satisfied customers to leave reviews on sites like Google or Yelp (if they haven't already).

Prospects searching for wellness services heavily rely on reviews and ratings to decide whom to trust. A strong rating *attracts* more clicks and calls. Similarly, social media testimonials or client success stories (with permission) can catch the attention of like-minded prospects. Seeing real people vouch for you builds credibility fast.

Tapping into local networks and partnerships can help you thrive through community connections. Consider how you might attract new clients via partnerships – for instance, a med spa partnering with a local yoga studio or bridal boutique to cross-promote services. We'll discuss this type of activity in more depth later when we talk about strategies to scale. Even early on, you can attract interest by networking in your local wellness community (e.g. participating in health fairs, giving a talk at a gym, or offering a first-visit discount to a neighboring clinic's clients). These tactics align with the unique patterns of wellness practices, where community trust and referrals are gold.

The primary outcome of the *Attract* phase is increased visibility among your target audience and an initial connection of trust. During this phase, you fill the top of your funnel with interested people. Of course, attracting attention alone doesn't pay the bills or increase your bookings – which is where the next critical phase comes in. Once you have the right eyeballs on your brand, you want to *Convert* them into actual appointments and sales.

## **Convert: Turn Prospects into Paying Clients**

At the *Convert* stage, your focus shifts from generating interest to generating action. It's time to transform curious prospects into actual paying clients. Think of all the effort you put into attracting someone to visit your website, follow your social feed, and read your emails as *half the battle*.

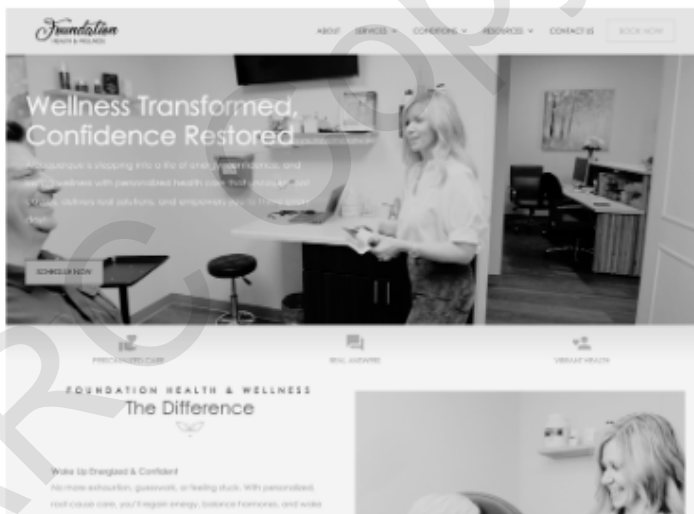
The other half involves creating a clear, smooth path for that person to take the next step — whether it's booking a service, scheduling a consultation, or purchasing a package. Without a conversion system, plenty of people might *look* but not enough will *book*. This phase builds bridges that turn engagement into revenue by outlining the key steps that convert eyeballs into revenue.

In a well-structured marketing system, conversion often takes the form of a focused website or landing page. In wellness industries, your website is often your primary conversion tool.

Ask yourself the following questions about your website:

- Does it immediately communicate what you offer and who you serve?
- Does it have a clear, visible call-to-action like “Book Now” or “Get Relief Now” without any hassle?

You should design every element – from service descriptions to the “Book Now” button – to guide a visitor toward becoming a client. For example, a med spa’s site might feature prominent, service-specific CTAs like “Book Your First Facial.” Additionally, trust elements like client testimonials, before-and-after photos (if applicable), and credentials help a hesitant prospect feel confident enough to take action. Your site should effectively answer the question in a visitor’s mind: *“What do you offer, how will it help me and how do I get started?”*



Conversion also takes the form of lead generation offers and follow-ups because not every prospect will book on their first interaction with you. Some might be “just looking” or not ready to commit yet. That’s where a nurturing lead magnet or list-builder offer becomes invaluable.

What should you create? We recommend considering some of the top-of-funnel questions you hear most often.

For example, if you have a physical therapy practice that receives many questions about back pain, you could offer a free guide called *10 Tips for Managing Back Pain at Home*. If you own a med spa and often answer questions about skin care, you could offer a free download called *Your Ultimate Skin Care Checklist* or a limited-time discount for first-time clients.



When you offer tremendous value upfront, you build trust and make it safe for prospects to share their contact information with you. At this point, they've moved from an anonymous visitor to an identified lead in your system – a critical conversion milestone. A simple lead magnet connected to an automated email follow-up is a critical component of a stable marketing foundation.

For instance, when someone downloads your guide or signs up, your email automation platform can send a friendly sequence: a thank-you email, followed by a few emails with additional tips, and an invitation to book a paid service when they're ready. This kind of nurturing maintains the conversation and gently guides the prospect toward becoming a client, even if they weren't ready to buy the first day they found you.

## **Make Saying “Yes” Easy**

Conversion also relies on another non-negotiable factor: streamlined booking and sales processes. If your internal systems create friction instead of ease, conversion will falter. Ask yourself, “If my prospect decides ‘yes, I want to try this service,’” how easy do you make it for them? Then examine your booking process: Can they schedule online in a couple of clicks? If they call or email, do they receive a rapid and friendly response?

It pays to automate *some* of this – for example, if you have an online booking system that allows them to self-book, you can significantly increase completed bookings versus a back-and-forth phone tag. Furthermore, train your front desk or staff to use a consistent, warm script for inquiry calls to make every caller feel welcomed and informed.

These practices remove friction from the buying process. When you dial in your conversion systems, you create a seamless experience where an interested person naturally flows into being a scheduled client.

Remember, conversion doesn't end when the person books an appointment. Particularly in wellness services, people tend to get cold feet or simply forget. Implementing reminders such as texts or emails via your scheduling system helps clients show up.

Beyond these automations, I encourage you to consider a personal touch in the form of a quick phone call or text the day before from your staff that says, “We're looking forward to seeing you.” Such personalization can increase show rates and set a positive tone.

If your conversion involves a sales consultation or intro session, you must implement a follow-up process for those who don't immediately buy a package. A structured *Convert* phase anticipates a scenario, such as someone coming in for a free consultation for your weight-loss program but failing to sign up right away.

In this example, you might schedule a follow-up call a week later or send a personalized email addressing any concerns they voiced and reminding them of the goals they shared with you. This kind of structured follow-up can significantly improve your overall conversion rate.

When your *Convert* phase is firing on all cylinders, every new lead has a much higher chance of becoming a paying customer. Remember, *Convert* does not seek to pressure people, but to make it easy and compelling for those who *would* benefit from your service to say “yes.” It bridges the gap between *interest* and *action*. And once someone has taken that action – booked and received your service – a new opportunity begins: turning that new client into a raving fan.

## **Create Raving Fans: Build Loyalty and Referrals**

Marketing doesn't stop once a prospect becomes a client – in fact, some of the most powerful marketing happens after someone walks through your door. That's why the *Create Raving Fans* phase focuses on client experience, retention, and advocacy.

In a successful wellness practice, your *current* clients become an engine for growth: they come back more often (increasing their lifetime value to your business), sing your praises to friends and family, and provide social proof to attract new clients with their testimonials. Investing in this phase prevents you from constantly chasing *new* leads to fill a leaky bucket; instead, you're building a loyal community that sustains your practice. The magic happens here, when patients do your marketing for you with reviews and referrals.

How do you create raving fans in a wellness context? First, deliver an exceptional client experience. This might seem obvious, but I cannot overstate it. The fastest way to turn a one-time customer into a lifelong fan is to *wow* them with value and care. In practical terms, you want to make every visit to your practice as pleasant and helpful as possible. Little touches like a warm welcome, a comfortable waiting area with tea or infused water, follow-up resources after an appointment, and remembering personal details (like asking “How did your daughter’s recital go?” on their next visit) make people feel valued. Your *service outcomes* matter, too.

For example, if you’re a chiropractor, the client should walk out feeling relief from whatever was bothering them; if you’re a nutrition coach, they should feel heard and supported with actionable advice. Strive for consistency in quality. When clients get ongoing positive results *and* feel great about how you and your staff treated them, they naturally become enthusiastic fans. They might even say things like “You’ve changed my life” — the ultimate mark of a raving fan in wellness.

Once you begin delivering that exceptional experience, it’s time to encourage and leverage reviews and testimonials. Happy clients are usually willing to share their experience, but you often have to ask — and likely more than once. Make it a habit to request feedback and reviews from clients who indicate satisfaction. For instance, if a client tells you, “I haven’t had a migraine in weeks thanks to you,” that’s a perfect moment to kindly ask if they’d consider writing a brief review online about their experience.

You can automate this process with a series of emails and text messages. Provide simple instructions or a direct link via text/email to make it easy. These positive reviews on Google, Facebook, or health directories will bolster your credibility for future marketing efforts and reinforce to the client that their voice matters in your community. Some practices display testimonial quotes (with permission) in their office or website because seeing their own words in a prominent place not only delights their clients, it deepens their loyalty. Remember, a heartfelt review equals free advertising from your raving fan to potential new customers.

At Salt Marketing, we provide our clients with pre-built automations, so they never miss an opportunity to send a post-appointment survey followed by a link to add a Google review, and one week later, an invitation to share a referral. And because online marketing can make or break out clients' internet marketing efforts, we implement a reputation management system that enables them to respond quickly and easily to good, bad, and indifferent reviews.

When the system alerts us to the occasional negative review *and* the positive reviews, we can act immediately to address a negative review professionally (an opportunity in disguise to demonstrate your willingness to resolve issues and send a powerful message to the reviewer and other prospects), and employ our “positive review” syndication tool to spread the good news on your website and social media platforms.

 **Cody Clark**  
3 reviews

★★★★★ a day ago **NEW**

First visit with Cindy and I couldn't be happier. I had the Hydra Deluxe facial and it was fantastic. She walked me through every step, explained the benefits, and took the time to talk through the best treatments for my skin. I left glowing—like, actually glowing. Highly recommend and will absolutely be back.



**Melissa M.** **Elite 26**

Summerville, SC

🌟 9 Beauty reviews

☆☆☆ Nov 21, 2025

I stopped in after leaving my nail salon to try this place out. The concept of a quick facial package is great, but I'm not sure how it really differs from a traditional spa. The prices are just as high, and the experience isn't very private.

The facial itself was excellent my esthetician was wonderful and I appreciated the idea of offering convenient services for women on the go. However, the pricing didn't feel worth it for the level of privacy and overall setup. If the costs were more reasonable, I would have continued services.

I would still recommend giving it a try, especially if convenience is important, but many may find the prices and add-ons too expensive.



In wellness, word-of-mouth has tremendous power. Once your clients post reviews, you want to leverage them by implementing a referral system. It could be something as informal as regularly reminding clients “We’re never too busy to help your friends and family, so feel free to send them our way – we’ll take good care of them,” or as structured as a referral reward program. For example, a massage clinic might offer “Refer a friend and you both get \$10 off your next session.”

Make sure any referral incentives comply with legal regulations for health-care businesses, but in many cases offering a bonus or even a simple thank-you note to the referrer can encourage more sharing. Your goal is to turn those happy client relationships into new clients *organically*. When your happy client can’t stop talking about how glowing her skin looks after treatments, she’s doing marketing for you – *for free*. Nurture her enthusiasm for greater success!

Finally, prioritize offering value and supporting clients between visits. You could do this via an email newsletter or a private online community where you share exclusive tips, news, or even special offers. For instance, a nutrition coach could send out weekly healthy recipes; a med spa might email seasonal skincare advice. This kind of content reminds past clients that you care about their results and well-being, not just about selling the next appointment. It maintains a relationship and makes them feel connected to your brand. Then, when they’re ready for more service, or when someone they know asks for a recommendation, your practice stays top-of-mind.

Creating raving fans is the phase that urges you to build lasting relationships. In the wellness field, trust and personal connection are paramount because patients often choose practitioners they *feel* care about them. By systematizing the ways you delight clients and encourage their advocacy, you turn that human trust into a scalable marketing asset.

A robust *Create Raving Fans* phase means your marketing starts to get easier over time: you don't have to push as hard to get new clients when your existing clients voluntarily bring new people to you, thanks to their positive word-of-mouth. Plus, you'll likely enjoy your business more since working with loyal, happy clients is rewarding and energizing.

At this point, we've covered the parts of the framework that directly involve interacting with clients and prospects: attracting them, converting them, and delighting them. Now we turn to the behind-the-scenes engines that make those front-end activities more efficient and powerful: automation and measurement. These next two phases, *Automate* and *Measure to Scale*, will elevate your marketing from a manual grind to a well-oiled machine that can grow reliably.

## **Automate: Streamline Your Marketing for Consistency and Ease**

Running a wellness practice is demanding: you're balancing client appointments, managing staff or vendors, and handling admin work and more. With so much on your plate, it's no wonder marketing tasks often slip through the cracks. That's why the *Automate* phase is a game-changer.

Automating your marketing involves using systems and technology to handle repetitive tasks and workflows *without your constant involvement*. The goal is to maintain consistency and momentum in your marketing, even with limited personal time.

As The Salted Edge program emphasizes, it's about "making marketing easy" with automation that *duplicates and amplifies* your success.

In other words, you take what's working (your effective content, campaigns, and client follow-ups) and set it up to run automatically or with minimal input, so it can reach more people and happen more reliably.

Let's explore what automation can look like in a wellness marketing system.

### **One: Email and SMS Automation**

Email and SMS automation for follow-ups and nurturing are the first and most obvious places to start.

Remember that lead magnet and those new client follow-ups we discussed in the Convert phase? They are perfect candidates for automation. You can pre-write a sequence of emails that every new subscriber or prospect will receive over time.

For instance, once a person downloads your "Wellness Guide" and becomes a lead, you might have a series of five emails over the next month educating them further and gently inviting them to try your services. Don't worry, this runs in the background – you don't have to email each person individually.

The same principle applies after someone visits your practice: you can set up an automated thank-you email or a text message that goes out a day or two post-visit, perhaps asking for feedback or reminding them of aftercare instructions. If they haven't rebooked, another automated message a few weeks later could offer a special incentive to return.

These are all examples of how *automation ensures no client falls through the cracks*. It's like putting parts of your client communication on autopilot, while maintaining a personal feel (since you write the messages thoughtfully in advance).

The result? You have established the backbone of your scalable marketing machine where automations, tech tools, and processes are working in sync without constant supervision.

## **Two: Social Media and Content Scheduling**

Maintaining consistency on social media or with your blogs becomes much easier when you plan and schedule content in batches. Automation tools, or even built-in scheduling features on platforms enable you to prepare posts ahead of time. You could devote one afternoon to creating all your Instagram posts for the next two weeks, then schedule them to be published at the right times.

The time investment of a few hours guarantees that your *Attract* content (tips, videos, etc.) posts regularly even during your busiest clinic days. You might simplify these efforts further by using recurring templates – say, every Monday your yoga studio posts a motivational quote, every Wednesday a quick posture tip, and every Friday a client spotlight.

A content calendar and scheduling system reduces the day-to-day effort and upholds consistency, the quality that builds trust and awareness. If you have a blog or YouTube channel, you can likewise schedule articles or videos in advance. Essentially, automation at this level guards against the common pitfall of “posting whenever I have time,” which often leads to long dry spells. Instead, your marketing stays active like clockwork.

## **Three: Customer Relationship Management - CRM**

I highly recommend employing a simple CRM in addition to your EHR or practice management system to keep track of leads, clients, and trigger actions based on behavior. Why? EHR systems aren’t designed for marketing.

For instance, when a new lead comes in, even if that lead isn’t ready to book, your CRM can automatically assign a follow-up task to you or a staff member. Similarly, if a client’s last visit was six months ago, your automation can send an email encouraging that client to come back in and simultaneously prompt you or a staff member to reach out with a “We miss you, here’s 10% off your next visit” email.

Modern CRM tools can integrate with email, calendars, and more to create these automatic nudges. You can also automate internal processes, e.g. every time someone books a consult via your website, you get an automatic notification, or a Google Sheet updates with their info, which reduces manual tracking. In essence, you're building *systems* that handle the routine tasks, so you can focus on high-level strategy and personal interactions that truly require your touch

Automation doesn't merely pertain to tools or software. It also involves nurturing relationships with your clients and patients by implementing repeatable processes (which might be documented as templates or checklists). For example, let's say you run an annual "New Year, New You" promotion each January for your medical weight loss offering. Instead of scrambling each year, you can turn this into a *template*: document the steps (dates to start advertising, the email content used, the landing page setup, the offer details), save all creative assets, and note the results.

Next year, you or your team can rinse and repeat the campaign with minor tweaks. This is a form of automation through process. We encourage practitioners to document marketing campaigns they can repeat without starting from scratch. By doing so, you effectively create a library of proven campaigns and SOPs (standard operating procedures). You're automating knowledge and reducing decision fatigue. In this way, your marketing becomes more of a science than an art: a series of checklists and templates that reliably produce results when executed. (And if you receive help from staff or an outsourced vendor, these invaluable playbooks help them execute your marketing in *your* preferred way).

A well-implemented Automate phase can feel liberating. Suddenly, you're not juggling dozens of marketing to-dos in your head or rushing to send a last-minute newsletter because much of it "just happens" on schedule. Perhaps most importantly, automation enforces consistency. Even when you're having a hectic week or you're on vacation, your systems are still attracting, nurturing, and engaging clients. And consistency drives results over time.

One note: automation doesn't mean removing the human touch or authenticity. You'll still create the content and set the strategy – but you'll let technology handle the delivery and the repetitive grunt work. This plays to a core idea we mentioned earlier: you didn't become a wellness practitioner to spend all day engaged in marketing.

Automating smartly lets you *market in your sleep*, literally booking clients or generating leads overnight, so you can spend more of your work time doing what you love (helping clients) or strategizing the next big idea. By now, you've attracted the right people, converted them into clients, delighted them into fans, and automated core processes to keep it all running smoothly. The final piece of the puzzle is to measure your results and use those insights to continuously refine and scale your practice's growth.

## **Measure Success to Scale: Become Data-Driven To Refine and Grow**

The fifth and final component of the Salted Edge Framework is Measure to Scale. It's last, but certainly not least, because it ties everything together and propels your marketing to new heights.

Measure refers to tracking your marketing performance with data, and Scale refers to using that information to make smart decisions that expand your success. In essence, this phase helps you become a data-driven marketer – even if that data is simple – to make sure you're never flying blind.

A proper marketing system is *measurable*: you can identify what's working and what isn't. Metrics give you confidence to invest more in the tactics that yield results and cut back on those that don't.

Scaling a wellness business might mean increasing monthly client bookings, opening a new location, launching an online program, or just achieving more revenue in less time. Whatever growth looks like for you, measuring will guide the way.

Here's how Measure to Scale typically plays out in a wellness marketing plan:

### **Decide Which Numbers Truly Matter for Your Goals**

You could measure many things (website hits, Instagram likes, etc.), but not all are meaningful. Focus on Key Performance Indicators (KPIs) that align with each stage of your framework.

For example, in Attract, a key metric might be the number of new leads per month or website visitors from your area. In Convert, you'd track conversion rates: what percentage of leads actually book an appointment or how many consults turn into clients. For Raving Fans, you could monitor client retention rate (how many first-time clients return for more) or referral count (new clients who said they were referred). For Automate, you might track how much time you're saving or the consistency of your output (e.g. four posts every month, 100% of follow-ups sent).

To see the big picture, you must gather metrics like monthly revenue, average revenue per client, and marketing cost per client acquired. Once you know what to measure, implement tools to capture that data. It could be as simple as creating a spreadsheet where you log monthly data, or using software: Google Analytics for web traffic, social media insights, or a dashboard that pulls together multiple metrics.

The Salted Edge approach often recommends a basic tracking dashboard to view metrics weekly or monthly, so you always know where you stand. The saying "if you can't measure it, you can't improve it" holds true – with tracking in place, you can start improving.

Remember that measuring is not just collecting numbers but also *interpreting* them. Set aside regular times (e.g. end of each month or quarter) to review your metrics. Look for patterns and insights. *Did that new Facebook ad campaign actually bring in five new consultations? Is your website conversion rate higher after you redesigned the homepage? Are email open rates improving as you refine your subject lines?*

By asking these questions, you turn raw data into actionable knowledge. Often, the data will highlight your biggest opportunities.

For instance, you might discover that while your Instagram posts get lots of likes, they yield few appointments, whereas your email newsletter, with a smaller audience, directly brings in several bookings a month.

That insight might lead you to invest more in email marketing (where you have proven ROI) and re-strategize your Instagram content to be more conversion focused. Measurement also catches problems early. If you see website traffic dropping or a decline in inquiries, you can react before it becomes a crisis.

The ultimate mindset here is one of continuous optimization – always tuning your marketing engine for better performance. In fact, an advanced practice will make data-driven decisions and continuously optimize marketing systems. Instead of making changes based on hunches or vendor sales pitches, you'll rely on evidence from *your own* business.

At this point, you have the ability to create more of what works and let go of what doesn't. With solid data in hand, you can scale confidently, which might involve increasing your marketing budget on a channel that is proving profitable.

For example, if you know every \$50 spent on Google Ads brings in a new client worth \$500, that's a great return, so scaling could mean increasing the ad spend to \$500 to bring in 10 similar clients. Or scaling could involve expanding your reach: perhaps your metrics show a high referral rate, indicating many happy clients. As a result, you decide to launch a referral campaign to your entire client base to amplify those word-of-mouth gains. It could also mean duplicating a successful campaign in a new market.

For instance, if your webinar event yielded several new memberships in your nutrition program, maybe you'll scale by running the webinar quarterly and investing more in ads or partner promotions to get a bigger audience each time.

On the flip side, measuring will also show you which efforts are not pulling their weight. Maybe you've been diligently blogging, but the data shows very few people read those posts and no leads have come from it. If so, it might be a sign to either improve your blogging strategy or reallocate that time to something else.

By trimming the fat and pouring energy into the winners, you maximize growth. Over time, your marketing budget and time produce more and more results – that's scaling.

As your system matures through measurement, you'll find you can plan ahead with greater confidence. You might set goals like "Increase client base by 30% in the next six months" and have the data to back up how you can achieve it (e.g. "We need X more leads, which historically means Y more website visitors or Z more ad spend"). Implementing advanced tracking and forecasting lets you confidently plan for growth, turning ambitious goals into realistic, data-backed plans.

Moreover, once the core marketing runs predictably (e.g. you can count on a steady influx of clients each month from your established system), you gain the freedom to focus on *strategic opportunities*. These opportunities might include expanding services, forming partnerships, or launching a second location – the kind of scaling moves that can significantly expand your impact and increase your revenue. Essentially, measurement gives you the reins to steer your business deliberately rather than being at the mercy of guesswork or external changes.

By embracing the Measure to Scale phase, you evolve from just "doing marketing" to engineering growth. It's a powerful feeling when you can look at a dashboard or report and truly understand the health of your practice's marketing. It turns uncertainty (e.g. "Is my social media worth it?") into clarity ("Instagram brought 10% of new clients last quarter, and with a tweak in strategy I aim for 15% next quarter"). And with clarity comes confidence. You'll invest in your marketing system like never before because you know what each part contributes.

Over time, this leads to exponential, rather than linear growth because you keep doubling down on what works best.

In the end, this phase of the Salted Edge Framework results in a dynamic marketing system — a living, improving process that grows alongside your business.

## **From Big Picture to Action: Next Steps in Your Marketing Journey**

This chapter has given you a bird's-eye view of the five pillars of a structured marketing system.

Let's take a moment to appreciate what this means.

Instead of chasing shiny objects or doing marketing in fits and starts, you are setting up a machine for your wellness business that attracts new prospects consistently, converts them efficiently, delights them into loyal fans, automates the routine so nothing falls through the cracks, and measures results so you always know how to improve.

This is the *antidote* to random acts of marketing. It replaces chaos with order and guesswork with insight. In short, it gives you control over your growth.

As one Salted Edge client noted, it's about implementing a *sustainable marketing system, not just one-off tactics*...a repeatable, stress-free way to attract and nurture clients without constantly reinventing the wheel.

With this framework, you can finally stop feeling like marketing is an uphill battle and start feeling like it's a strategic advantage for your practice.

So, what's next? The rest of this book will explore the specific tactics and action items in greater detail, turning this high-level theory into actionable strategies and step-by-step implementations.

In the coming chapters, we'll break down practical techniques and examples for each phase, including:

- Crafting compelling content that *attracts* your ideal clients
- Optimizing your website and follow-up processes to *convert* more bookings
- Discovering specific ways to *wow* clients and generate more reviews/referrals
- Choosing the right tools to *automate* your workflows
- Identifying the key metrics to *measure* and scale effectively.

By linking each strategy back to the framework, you'll always see how it aligns with the bigger picture. This approach keeps you focused and prevents the overwhelm of too many ideas because every tactic has its place in the system.

As you turn the page, take confidence in the fact that you now have a roadmap. You might even feel a sense of relief that you don't have to do everything at once and can build this systematically. Many wellness practitioners find that just knowing there's a logical order to follow removes significant marketing anxiety. Instead of random efforts, you'll execute a plan.

And remember, you're not starting from zero; you likely have pieces of this framework already in motion (maybe a Facebook page here, an email list there). The goal is to organize and enhance those pieces under one cohesive strategy.

By introducing the Salted Edge Framework in this chapter, we've moved from a scattershot view of all the things you *could* do (the myriad marketing options out there) to a strategic view of the things you *should* do, in a cohesive, logical way.

You should feel a sense of direction and momentum now that you're building something tangible – a marketing engine tailored to your wellness business. And as you build it, piece by piece, your confidence will grow alongside your results.



### Chapter 3 Salt Shaker: Identify the Current State of Your Practice in Relation to Each of the Five Areas

Before we dive deeper in the following chapters, take a moment to ask and answer the following:

- **Attract:** Do we have a detailed description of our ideal client and are we consistently pulling in new leads?
- **Convert:** Do we have a smooth path for interested people to become clients, and do we follow up on every lead?
- **Create Raving Fans:** Do we regularly receive referrals and great reviews, and what could we do to improve client experience?
- **Automation:** What tasks am I doing repeatedly that a tool or process could handle, and do we have any systems in place already?
- **Measurement:** Are we tracking anything right now, and what would be the most useful metrics to see?

Jotting down honest answers to these questions will give you a baseline and some immediate ideas about the location of your “low-hanging fruit.” You might realize, for instance, that you have almost no automation set up – a clear opportunity to save time – or that you get plenty of leads but have low conversion rates (meaning tweaking that phase could boost revenue quickly).

Use this self-assessment as motivation, not a reason to beat yourself up. The gaps you identify now are simply areas of focus as you implement The Salted Edge Framework. Every practice will have different strengths and weaknesses; the beauty of a comprehensive system is that it leaves no area neglected since the structured approach forces you to strengthen each link in the chain.

In Part Two, we'll take these high-level concepts and turn them into real-world actions that will transform your practice's marketing. You have found the missing system. You're about to create it step by step and own your growth like never before.



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# Part II

The Salted Edge Framework & Your Marketing Playbook

ARC Copy Only

# Chapter Four

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## Attract

### Get Found by the Right People

**T**he first rule of marketing: know your audience. This chapter focuses on *Who*, *What*, and *Where* – the core framework for attracting the *right* clients to your med spa or wellness practice. I'll help you clearly define your ideal customer, develop messaging that speaks to their deepest needs (making them the hero of the story and you the helpful guide), and choose the right marketing channels and tactics to enable your people to find you.

Think of it like chatting with a friend over coffee: I'll share concrete examples (imagine your favorite past client!), friendly advice, and even quick checklists to keep you on track. By the end, you'll have a clear plan to focus your niche, clarify your message, and set up basic SEO and social strategies so the *right* people come looking for you.

#### **Market: Define Your Ideal Customer**

Before you start shouting about the awesomeness of your med spa, slow down and ask: “*Who exactly am I talking to?*” The more specific you can be when describing your ideal client, the better your marketing will work – and yes, that means *repelling* people who aren't a good fit.

Imagine your favorite client or patient. What traits do they have? Are they a busy professional concerned about aging? A stressed-out mom in need of self-care? A fitness fanatic tackling hormonal issues?

Write down as many details as you can: age, job, hobbies, goals, challenges, values, where they hang out online, and even what might annoy them.

Place these clues into your Ideal Customer Profile (ICP) or buyer persona, and build your persona with age, location, challenges, and aspirations. For a massage therapist, it might be “a 35-year-old professional with neck/back pain from long desk hours.” For a med spa, it could be “a 45-year-old woman juggling work and family, eager to look refreshed but wary of unnatural results.”

Sketching your ideal client with such specificity gives you permission *not* to market to everyone. As Qualtrics<sup>1</sup> explains, the whole point of an ICP is to focus on *qualified* leads — the ones most likely to become happy, long-term customers.

Why waste time on people who aren't interested in what you do? If someone doesn't fit your profile (say, a 20-something who doesn't care about skincare yet), letting them bounce is a good thing. You'll *save* time and dollars by homing in on those who *will* value your services.

## How To Build Your Unique ICP

- Review past “A+” clients. Who did you love working with? What made them come back or refer friends? List shared characteristics: demographics (age, gender, location), professions or lifestyles, pain points they talked about, values, and even their favorite social media or magazines.
- Get specific about their goals. What is their *transformation*? For instance: “feeling confident in a swimsuit again”, “managing chronic pain naturally”, or “glowing without makeup”. It tells you what they *want*, not just the service you sell.

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1. <https://www.qualtrics.com/>

- Acknowledge their fears or frustrations. What worries them? (e.g. cost concerns, fear of needles, skepticism about results.) Addressing these objections directly in your marketing builds trust because you’re demonstrating empathy.
- Embrace the niche. It’s okay if your profile is small. In fact, the first step in Salt Marketing’s growth roadmap is clarifying who you serve. When you know your niche (for example: “BOTOX® for busy moms” or “wellness plans for executives under stress”) your message can cut through the noise. You won’t appeal to *everyone*, but you’ll resonate deeply with the *right* few.

NAME: SARAH, A GROWTH-MINDED WELLNESS OWNER		
 <p>Salt Marketing attracts wellness practitioners who are driven entrepreneurs but identify first as healers, clinicians, or medical professionals. They've built established practices generating \$500K-\$3M annually, often with a small but dedicated team of three or more employees. Based in mid-sized U.S. cities or suburban markets, they're passionate about helping people feel better, live longer, and thrive — but feel stretched thin running the business side of their practice. They're not part of a franchise or corporate group; their practice is their personal vision brought to life. While they excel at delivering exceptional client care, they're frustrated by inconsistent marketing results, operational bottlenecks, and a lack of cohesive strategy to attract more of the right clients and grow sustainably.</p>	<p><b>Age:</b> 35-55</p> <p><b>Occupation:</b> Owner/founder of a wellness business</p> <p><b>Location:</b> U.S.-based, primarily in mid-sized cities and suburban markets.</p> <p><b>Business Structure:</b> Single or multi-location;</p> <p><b>Annual Business Revenue:</b> \$500K-\$3M</p> <p><b>Team Size:</b> 3+</p> <p><b>Household Income:</b> \$150K-\$500K</p>	<p><b>Personality:</b></p> <ul style="list-style-type: none"> <li>• Mission-driven and empathetic — They lead with compassion, genuinely caring about their clients' well-being and seeing their work as a calling, not just a business.</li> <li>• Results-oriented but overwhelmed — They want measurable growth but often feel pulled in too many directions to focus on strategy.</li> <li>• Relationship-focused and loyal — They value long-term partnerships, both with their clients and with vendors who understand their vision and speak their language.</li> </ul> <p><b>Interests/Behaviors:</b></p> <ul style="list-style-type: none"> <li>• Invests in personal and professional growth — Attends wellness conferences, follows industry leaders, and seeks out education that helps them better serve clients and grow their practice.</li> <li>• Adopts tools that save time and improve client experience — Willing to invest in technology, automation, and systems when they see clear ROI and ease of use.</li> <li>• Values reputation and community presence — Actively engages in local events, partnerships, and client relationship-building to strengthen their brand's credibility and trust.</li> </ul>
	<p><b>Influences:</b></p> <ul style="list-style-type: none"> <li>• Peer Recommendations &amp; Success Stories</li> <li>• Tangible ROI &amp; Proof of Results</li> <li>• Ease of Implementation &amp; Time Savings</li> <li>• Alignment With Values &amp; Brand Vision</li> <li>• Industry Credibility &amp; Thought Leadership</li> <li>• Client Experience Impact</li> </ul>	<p><b>Media/Brands/Influences:</b> American Med Spa Association (AmSpa), MindBody Business resources, Functional Medicine Coaching Academy, American College of Lifestyle Medicine.</p> <p><b>Events &amp; conferences:</b> AmSpa Medical Spa Show, Functional Medicine Conference, MindBody BOLD, InGoop Health.</p> <p><b>Podcasts &amp; thought leaders:</b> The Mind Your Business Podcast, Wellness Business Podcast</p>
		<p><b>Fears &amp; Frustrations:</b></p> <ul style="list-style-type: none"> <li>• Wasting money on marketing that doesn't work</li> <li>• Losing clients to better-marketed competitors</li> <li>• Burnout &amp; Overwhelm - can't do it all</li> <li>• Falling behind in a fast-changing market</li> <li>• Inconsistent client flow</li> <li>• No cohesive strategy</li> <li>• Lack of visibility</li> </ul>

Sometimes it helps to put it in writing. Create a bullet list or paragraph describing your ideal client: give them an actual name, outline their day, describe their skincare/training concerns, list their hobbies (maybe yoga or running), and explain how they feel on a rough day. Use this persona when writing ads, posts, or even answering the phone. If a lead doesn't match (say, someone only wants a cheap quick fix), it's not worth chasing. If the prospect doesn't fit your ICP, let them go and focus your resources on helping prospects who *are* your people.

Step one is always *clarity* on your audience and your message. Don't fall into the trap of trying to appeal to too large of a market. If your posts are attracting anyone, your ICP may be too vague. Update your messaging to directly address “[YOUR CITY] women over 40 worried about aging skin.” In other words, knowing exactly who you serve sets you free to speak directly to them – and gently filters out the rest.

### **Message: Speak to Their Needs (Million-Dollar Messaging)**

With your ICP in hand, your next step is to speak their language. Remember, it's not about bragging about your services (as a test, note how many times you say the word “we”); it's about *them*. As a StoryBrand Certified Coach, I teach my clients to think of their messaging in terms of the StoryBrand Framework by Donald Miller<sup>2</sup>, where *the client is the hero* of their own story, and *you* (the practitioner), are the experienced guide.

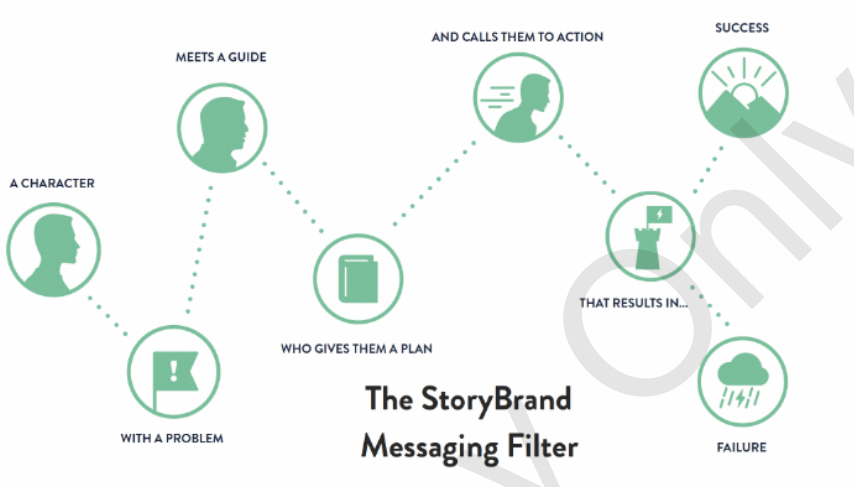
Your messaging should always position your ideal client as the hero of their story, and explain how you, as the trusted guide, can help them reach their goals. It should boldly communicate: “You want X (hero's goal), and I can help you get it.”

With your ideal client as the hero and you as the wise guide, your message provides the bridge between their current struggle and your promise of transformation.

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2. <https://www.donaldmiller.com/>

Structure the copy on your website, ads, lead magnets, emails, etc. to align with the StoryBrand Framework using the 7-part BrandScript:



*Image credit: StoryBrand*

1. **A Hero who wants something.** This is your client, the hero of their story. You must identify what they want and define the character in your brand story, which requires understanding their desires, challenges, and motivations. Maybe your ideal client wants youthful, glowing skin that helps them feel professionally confident. Whatever it is, name it.
2. **A problem that stands in their way.** Empathize with their obstacles or frustrations, which could include “skin not responding to normal treatments,” “time-starved schedule,” or “fear of looking fake.” Articulate these challenges to compel your clients to seek you as the guide. If you’ve listened to client feedback, you might hear complaints like, “I tried home remedies and still see wrinkles,” or “I hate waiting months for results.” Those are real problems you can fix.

**3. You, the Guide, who understands.** Position yourself as both empathetic and authoritative. This messaging framework highlights that a guide shows empathy (“I understand how frustrating this is for you”) *and* authority (“and I have 15 years helping people achieve smooth skin safely”). For example: “I know juggling family and work can leave you exhausted, and that can show up on your skin. Over my career as an RN-turned-esthetician, I’ve helped hundreds of busy parents regain that fresh, rested look.” This type of language builds trust because they feel heard *and* they know you’re capable.

**4. A clear plan.** Lay out the simple steps they’ll take with you. For instance: “First, book a free consultation. Next, I’ll create a custom plan. Finally, our treatments fit your schedule, leading to glowing results.” This framework is a “clear plan to guide your hero from their current state to the ideal state (their want).” Keep it concise - this is an intentional over-simplification - and in plain language to reassure people that working with you won’t be overwhelming.

**5. A call to action (CTA).** Be direct about what they should do, and why. Since people often hesitate when making a wellness decision, a clear CTA helps. Some examples include, “Schedule your consultation today” or “Text us now to claim your free skincare analysis.” Your hero must feel called to action, whether through your website buttons, phone calls, and even in posts. Be clear about the steps to success.

**6. Success.** Cast a vision for their life after they work with you by describing the benefits and transformation they’ll experience. For example, “Imagine waking up each morning to firmer, smoother skin that makes you feel confident in your meeting room.” This is the *emotional* payoff. It’s your chance to show them what success will look like if they take action. Perhaps share a brief client quote or before and after snapshot (with permission), or use vivid language about feeling radiant, youthful, and at ease.

**7. Failure (pain of inaction).** Without being too negative, gently remind them what's at stake if they stick with the status quo or choose a competitor. For example, "Without action, those fine lines may deepen," or "that chronic pain might mean missing out." You want to clearly identify the consequences of not taking action to instill real urgency and remind prospects that there's a cost to waiting.

If your messaging sounds like a grocery list of services, it probably won't connect. Instead, talk to that ideal person using their terms. Let them feel like you "get them." As we advise on the Salt Marketing blog<sup>3</sup>, after building your BrandScript, distill it into a concise one sentence slogan (for a website headline or elevator pitch) that encapsulates what you do, how it helps, and how to get it.

Don't be afraid to be a bit bold or niche in your message. Your practice differentiates itself in the marketplace by standing out, not blending in. If the whole city needs your services, great; but that's highly unlikely. If your message causes a few people to disqualify themselves, it has done its job. If they aren't your target, it proves that your messaging is dialed in. Niche clarity generates trust, and when people hear you talk explicitly about their situation, they relax and think, "*This is exactly what I've been looking for!*"

## **Media: Get Found Online (SEO, AEO, Local & Social)**

Now that you know *who* you're talking to and *what* to say, the final piece is *how* to reach those people. In modern marketing, that means the internet – but in a smart way. We'll cover basic organic strategies to enable your ideal clients to find you when they search or scroll. Think of it as "pull marketing": make it easy for someone Googling or browsing social media to come across you. We'll break it into SEO vs. AEO, content fundamentals, local search (Google Business Profile), and social/video tips.

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3. <https://saltmarketing.co/blog/>

## Get Found in Search with SEO and AEO

Search Engine Optimization (SEO) and Answer Engine Optimization (AEO) are two sides of the same coin. Traditional SEO optimizes your website to rank well for key terms (like “med spa Charleston” or “acupuncture [your city]”). As the newer aspect of internet marketing, AEO involves structuring your content so that Google (or Alexa, Siri, ChatGPT, etc.) can *extract answers* and show them directly to users. In practice, SEO and AEO overlap significantly, but there’s an important distinction.

With traditional SEO, you target relevant keywords (words/phrases people are already searching for) in your site’s content and structure to rank higher on Google. For example, research what your ideal client searches for, then use those phrases naturally in your page titles, headers, and text. Salt Marketing expert Greg Brooks<sup>4</sup>, Partner at SearchTides<sup>5</sup> notes that key parts of SEO include keyword research, content creation, and optimizing your Google Business Profile.

In terms of content, long, helpful articles, such as blogs on common questions people ask, perform well. Internally linking pages (e.g. from a blog post to a related service page) helps visitors and Google easily navigate your site. We’ll get into building a conversion-focused website in the next chapter; for now, I want you to understand the urgency of having a fast, mobile-friendly site with a clear path.

Today, wellness practices must also consider AEO and becoming *the answer* on platforms like Chat GPT, Google’s AI-generated “featured snippets,” Siri voice answers, or AI chatbots. For instance, if someone asks Google, “How to treat fine lines without surgery?”, an AEO-optimized site might have a Q&A section from which Google can pull. AEO content offers concise answers to questions (think bullet-point lists, step-by-step, or clear Q&A sections) to show up on the answer engine immediately.

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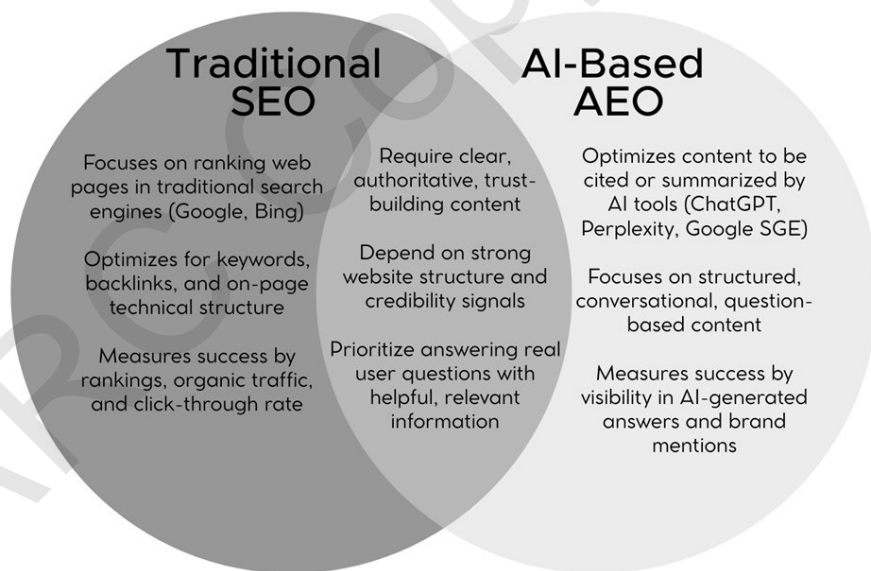
4. <https://www.linkedin.com/in/gregorybbrooks/>

5. <https://searchtides.com/>

Unlike SEO, where you might seek to attract people *to* your site, AEO focuses on zero-click answers, right within the platform the searcher is searching on. You might see this as a missed opportunity but if it's done well, your branding and links still shine. The trick is to anticipate the actual questions your ideal clients might ask and answer them transparently on your site.

SEO and AEO work together to share high-quality content, clear structure, and authority-building. If you've built a solid SEO foundation, you can likely step up your game with effective AEO.

In other words, you still need relevant keywords and webpages to perform well in AI answers. That's why I encourage you to plan for both: optimize traditional ranking factors *and* include short answer-type content.



## Your Process for Effective SEO and AEO

First, put yourself in your client’s shoes. What would *they* google? Use tools like Google Keyword Planner<sup>6</sup> or even Google autocomplete<sup>7</sup> suggestions to find common search phrases around your services (e.g. “best microblading near me”, “how much does BOTOX® cost,” and “natural anxiety remedies”). Make a list of words and phrases with high search volume for which you’d like to be found, and sprinkle them into your titles, headers, and page text. Then, start writing blog posts or FAQs answering those queries. For example, if clients often ask you about recovery time, write “How long is recovery after laser facial?” in an FAQ. When Google sees you have straightforward answers, you improve your AEO chances. Remember to use clear headings (H2s H3s) that match questions, to allow search engines to index them nicely.

Another great way to improve your visibility is to connect related internal pages. On a service page about facials, link to your “Before & After photo gallery” or “Skincare Tips” blog. This practice helps Google understand your site structure and keeps visitors around longer — which makes them more likely to book! Keep in mind that despite the popularity of AI tools like ChatGPT, they rely on the internet for the answers they provide. Drawing on websites, books, Wikipedia, sites like Reddit and LinkedIn, academic and research papers and more, AI models provide answers derived from existing content. Use AI as a *tool* (e.g. for idea brainstorming), but always review and personalize your content. AI will never replace the need to be authentic and truly helpful — especially when it comes to people’s health & wellness.

## Local SEO: Google Business Profile & Maps

For most med spas and local wellness practices, local search is gold. Picture a potential client on their phone searching for “*IV hydration therapy*”

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6. <https://support.google.com/google-ads/answer/7337243?hl=en>

7. <https://support.google.com/websearch/answer/7368877?hl=en>

*near me*” or *“facial med spa downtown [your city]”*. Google will show the Local Pack (top map listings) and Google Maps results. This is where your Google Business Profile (GBP) can make or break your success. A well-optimized GBP acts like a direct pipeline to new bookings. In fact, 68% of online experiences start with a search engine and 90% of consumers are more likely to visit a business if it has photos<sup>8</sup>. Complete Google profiles get *7x more clicks* than incomplete ones!

## How To Optimize Your Google Business Profile

**JAG Medical Spa** ⋮ ×

5.0 ★★★★★ (338) · Medical spa in Summerville, South Carolina

[Manage your Business Profile](#)

45+ Photos

[Website](#) [Directions](#) [Save](#) [Share](#) [Call](#)

Overview Reviews

Review summary ⓘ

5	★★★★★	5.0
4	★★★★	
3	★★★	
2	★★	
1	★	

338 reviews

“... such a joy! Customer service is outstanding! Everyone is so welcoming.  
**Services are superb- the clinical expertise of employees are outstanding!**”

8. Optimize Your Med Spa’s Google Business Profile, Salt Marketing, <https://saltmarketing.co/med-spa-google-business-profile/>

- Claim and verify your profile ([business.google.com](https://business.google.com)). Use the exact same name, address, and phone (NAP) as your website and other online listings. Choose “Medical Spa” or the closest category.
- Fill out everything! In your description, tell your story in keywords: mention your location and specialties (“Indianapolis med spa offering laser facials and weight-loss programs”). List all services you provide. Add business hours (include holiday hours).
- Add photos and videos. Make sure you have an exterior photo of your location(s). Post high-quality before and after shots (with consent!), friendly staff photos, and pictures of your treatment rooms. People click on visuals: Businesses with photos get far more interest. A short video tour of your practice or staff introductions can build trust in the minds of your ideal clients that you’re real people, willing to stand behind what you do.
- Include keywords and local info. Pepper location words into your listing. For example, use your city/neighborhood in services and descriptions (e.g. “IV therapy downtown Bowling Green”). Also list up to 20 service areas if you pull from surrounding areas.
- Build your reputation by gathering and answering reviews. Encourage happy clients to leave Google reviews. As a bonus, ask them to mention the specific service and location (e.g. “Loved my HydraFacial at [Spa Name] in Pocatello!”) to boost local SEO. Make it a habit to respond to negative or positive reviews: express thanks for the positive reviews and address the concerns of negative reviews politely. In your responses, repeat the additional keywords and phrases you’d like to be found for. Reviews build credibility, improve rankings, and can sway newcomers to trust you (and Google is more likely to serve up active profiles).

- At least once a week, upload a new photo or two and post on your Google Business Profile (like mini social posts). You can share specials, new services, or events, promote seasonal specials, or share tips, just like you would on any social platform. These efforts keep your profile active and in favor with Google.



*Scan this QR code to Get Found! Download my Google Business Profile Easy Optimization Guide.*

Investing a little time here offers big returns. When local clients search “best med spa near me,” Google will promote businesses that look complete and active. If your GBP lacks key details or is outdated or unclaimed, *you’re losing bookings*. In short, make Google your ally and be the first local option your ideal clients see.

## **Content & Quick Wins**

Beyond SEO and local listings, some quick wins in content and social media can increase visibility. Showcase success stories on your website and social channels.

A short case study or a featured video testimonial can be very persuasive. It’s storytelling in action: the client again is the hero who achieved something with your help.

Collecting and displaying reviews is a powerful strategy. Embed those Google reviews on your website. Remember to highlight the transformation your clients or patients have experienced, not just the service they opted for.

Be sure you're blogging with purpose because even simple blog posts support your online visibility. Before you select a topic or start typing, act as if you are your ICP, and ask, "What questions would I type into Google?" Then answer them.

Posts like "*What to Expect from Your First BOTOX® Appointment*" or "*How To Reduce Anxiety: 5 Simple Techniques*" directly address patient concerns. This educational content helps readers and gives Google relevant material to index. Known as the E-E-A-T<sup>9</sup> formula, Google evaluates your content's ability to demonstrate **E**xperience, **E**xpertise, **A**uthoritativeness and **T**rustworthiness. Demonstrate all four and give your content a boost in quality and credibility.

Marcus Sheridan's book, *They Ask, You Answer*<sup>10</sup> teaches businesses to educate customers by openly answering their questions. This practice builds trust and positions you as an expert – in fact, Sheridan says it can make you the most trusted voice within your industry. Consistently providing honest, helpful answers (even about costs or side effects) will increase your authority and traffic.

Remember to make yourself the authority by providing internal links to other content on the same topic. If you write about "*IV therapy benefits*," link that post to your IV hydration booking page. Internal linking keeps readers browsing and guides them toward your services. Connect each blog post to a core "pillar" page and vice versa.

A strong internal linking structure helps search engines and users navigate your site, strengthens your site's authority, and makes people more likely to become clients based on the depth of your knowledge.

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9. <https://developers.google.com/search/docs/fundamentals/creating-helpful-content#:~:text=While%20E%2DE%2DA%2DT%20itself%20isn't,topics%2C%20or%20YMYL%20for%20short.>

10. Marcus Sheridan's book, *They Ask, You Answer* <https://marcussheridan.com/they-ask-you-answer/>

Every time you publish a new article, integrate it into this internal network. By interlinking related posts and service pages, you help visitors discover all the ways you can help, maximizing the impact of your content.

## **Social Media & Video: Human Connection**

While search drives discovery, social media and video humanize your brand and nurture relationships. These platforms let you connect emotionally with your audience – reminding them that real, caring people (you and your team) are behind the services.

In today's digital landscape, communication has become more challenging than ever, making visual storytelling an essential component of your marketing strategy. Consider infographics, before and after photos, or short clips demonstrating something useful. You can also create storytelling visuals by sharing behind-the-scenes photos or short videos.

For example, create a one-minute video demonstrating a common procedure or explaining a health tip. It doesn't have to be polished and perfect; even your phone camera is fine. Videos like these help your ideal prospects feel like they know you. Use consistent, high-quality images and infographics to explain complex health info. Create your Brand Kit inside Canva<sup>11</sup> to ensure that your logo, colors, and fonts remain consistent, no matter which member of your team is creating visuals



*Scan the QR code for my downloadable guide to creating your Canva Brand Kit.*

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11. <https://www.canva.com/>

Another great option is to go live: schedule a short Facebook/Instagram Live or Instagram Stories Q&A once a week. Answer audience questions or talk about a trending topic. Live interaction builds trust because it's unscripted and immediate. Live sessions and interactive polls are excellent ways to engage your audience. If you're intimidated by carrying a live session yourself, you can invite a satisfied client or collaborator to join your live chat for broader reach.

Of course, when we talk about creating human connections, we want to emphasize authenticity and trust: Think about video testimonials and transformations as content that positions you as an expert and builds referrals. A post might say: "Meet Sarah – a nurse and mom of two. She came to us feeling exhausted and out of shape. After three months on our wellness plan, she lost 15 pounds and has boundless energy!" Real stories like this resonate with similar prospects to attract more of your ICP.

Don't just broadcast your content; engage. If someone comments on a post or asks a question, reply promptly with a helpful answer. Salt emphasizes responding to comments and DMs to build a community. Even a simple "Thanks for asking! Our clinic is open 9-5 and you can call this number..." shows you're attentive. People remember brands that feel responsive.



*Scan the QR code for my easy guide to responding to messages on social media!*

Keep your messaging and visuals consistent and use the same friendly tone across channels, whether it's Instagram, Facebook, or YouTube. A consistent voice and look across posts makes your brand recognizable. So, if you've decided on "cheerful and caring" language, use it everywhere.

Conversely, if you're known for explaining the science in a way everyone can understand, make that voice clear

Of course, you want to celebrate outcomes, not just features: Focus your captions on results. Instead of "Our new laser uses XYZ technology!", try "Our laser can help fade that stubborn sunspot in just 3 sessions." Always tie back to how it helps your ICP. Never underestimate the power of emotional connection. For example, stories about "why I became an acupuncturist" or "seeing tears of joy when a patient's pain subsides" stir something inside of people and help them perceive you as someone they can trust.

By building a warm, informative social presence, you stay top-of-mind. A person scrolling through Instagram might think, "This provider talks about my problem and actually helped someone like me" – and then click through to your site. Social media also supports SEO indirectly (more brand searches, link sharing). While social media won't replace your on-site SEO, it complements it by showing the human side.

At this point you've identified *who* to target, crafted *what to say*, and set up *where to say it*. Keep it simple and authentic and invite conversation. Start by refining your niche (ideal clients), then double-check that every headline, ad, and post clearly addresses their desires and fears, StoryBrand style. Meanwhile, stick to the SEO basics (relevant keywords, helpful content, a polished Google profile) so your ICP actually finds you when they search. Add some genuine storytelling on social or video to show them the real person behind the practice.

Remembering to think in terms of who, what, and where may sound intimidating, but each step you take builds a solid foundation to attract your ideal clients and patients. Even one blog post or a well-optimized Google listing can start sending the right people your way, the ones who will benefit the most from what you have to offer. You've built a great practice – now put the X on the spot and the treasure map in their hands so they can find you!



## Chapter 4 Salt Shaker: Identify *Who* to Target, Develop *What* to Say & Set Up *Where* to Say It

Before you move on, pause and put this chapter to work. Grab a notebook (or open a doc) and do three simple things right now:

1. **Name your person.** Write out one crystal-clear Ideal Client Profile. Give them a name, an age, a lifestyle, a frustration, and a desire. If you're talking to everyone, you're talking to no one. Scan the QR code below to download a PDF of an example ICP and my fillable ICP Worksheet!



1. **Rewrite one message.** Take a headline, your social bio, website header, or ad and rewrite it so it speaks *directly* to that person's fears, goals, and language with empathy and clarity.
2. **Plant one visibility flag.** Optimize one channel this week: update your Google Business Profile, publish one FAQ-style blog, or post one short video answering a real client question.

You don't have to overhaul everything at once because clarity compounds. When you know *who* you're speaking to, *what* to say, and *where* to show up, the right clients start finding you. Remember, your next client, the hero of their own story, is already searching: make sure they recognize themselves when they see you, the wise and experienced guide they need to achieve the transformation they seek.

# Chapter Five

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## Convert

### Turn Interested Traffic into Booked Appointments

Online visibility is only half the equation. If you want your wellness practice to grow and thrive, your website must convert visitors to booked appointments. That's the power of the Convert phase of the Salted Edge Framework.

To lead prospects into becoming clients or patients, you must transform your website into a warm, welcoming, and effective conversion machine. Think of it as a team member who's always on call, guiding people from interest to action, no matter the time of day. To accomplish this objective, each page should have a clear purpose.

It's better to have a slightly longer scroll than to cram too many disparate elements together. White space, concise text, and obvious next-step buttons all contribute to a cleaner journey that naturally leads visitors to convert. A well-structured site aligns with the user's needs and your business goals, making the path to booking logical and compelling.

#### **Strategy & Structure: What's the Purpose of Your Website?**

Your website is more than just a digital brochure — it's the front door to your business. For this reason, it's worth asking: what do you want visitors to do when they arrive? For most practitioners, it's a straightforward answer: book an appointment.

Therefore, build your site with this goal in mind. Each page should gently guide your visitors toward that outcome, whether their search takes them to your home page, a blog post, or a service page. Start by mapping out the core pages of your site. At minimum, most wellness practice websites need the following pages or sections:

- **Home Page:** A snapshot of your value proposition and a clear path to book.
- **About Us:** Don't let the name fool you, this page is not about you. It's about the experience your ideal client or patient can expect when they work with you. Introduce your practitioner(s), your values, and philosophy, and include testimonials. Remember, the purpose of this page is to build connection and credibility.
- **Services/Treatments:** Explain your services/treatments in detail. Each service should have its own sub-page under a main Services/Treatments page to give you the ability to send prospects directly to that service when you share them in emails or on social media.
- **Conditions or Problems You Solve:** Organize content by client/patient need. For example, include a section for common conditions, separate from services. This arrangement respects the customer journey and adds a user-friendly touch.
- **Testimonials/Reviews:** Since testimonials are powerful trust signals, showcase happy client feedback and results. If appropriate for your type of practice, include a before & after gallery, which builds proof of the results you deliver.
- **Blog or Resources:** Regularly publish educational articles that attract and inform visitors and establish you as the trusted guide and authority in your field. Publishing SEO-optimized content that aligns with Google's E-E-A-T formula supports SEO and top-of-funnel content needs.

- **Contact Us:** Make it easy to get in touch by including a form, phone number, address, and hours.
- **Book Now:** Arguably the most important feature of your website, although it might not be an actual page but rather a prominent button that leads to your scheduling system. Your prospects should be able to access it from every page (often in the top right menu).

**Pro Tip:** Using a flexible content management system (CMS) like WordPress enables you to adapt and refine your site structure as you grow. With a CMS, you can add pages, integrate a blog, update navigation, and bolt on new features as you grow. For example, if you expand services or locations, you can quickly create new pages. WordPress is also optimized for SEO. For these reasons and more, many med spa and clinic sites (including our examples) are built on WordPress.

In your footer, be sure to provide your NAP: Name, Address and Phone, consistent with your Google Business Profile. Also publish links to your social media profiles: at a minimum, Facebook, Instagram and LinkedIn, so your prospects can easily jump off, engage with you on social media, see what you're doing, and be able to press that important "like," "follow" or "subscribe" button. When your prospects can see your social media content, it creates a sense of authenticity. The footer should also include important information like your privacy policy, accessibility statement, Terms & Conditions and quick links to contact you.

When structuring your site, think from the patient's perspective. Organize your navigation in a logical, *conversion-friendly* way. That usually means keeping the top menu simple and intuitive. Your site should be structured to inspire conversion.

There is no one-size-fits-all formula for your website; however, at minimum, your site should include a clear home page, an inviting about us page, individual service descriptions, a testimonials or success stories section, and an easy-to-use contact or booking page.

Navigation should be simple, intuitive, and designed with action in mind, with that “Book Now” button in the upper right of every page.

## Creating a Home Page That Converts

Imagine what someone would do if they walked into your physical practice and no one greeted them. They’d likely look around for a minute, feel uncomfortable, and walk back out. That’s exactly what happens on many websites. Your home page must make visitors feel welcome and understood immediately. They should feel, well, *at home*.

A great home page will immediately communicate who you help, how you help them, and what they should do next. Salt Marketing’s philosophy, inspired by the StoryBrand framework, is to structure your home page in *sections* that tell a clear story and guide the visitor step by step. Let’s break down the key elements of a high-converting home page layout:

The first section of your home page — what we call the “hero section,” should immediately convey three critical factors (what StoryBrand calls the “grunt test”): who you serve, how you help, and how they can get it. These elements go right back to your ICP. For example: “Helping women over 40 restore energy and confidence through science-backed wellness treatments” is much more powerful than “Your Bay Area Med Spa.” Keep the hero section clean, direct, and paired with a visible button that invites people to take the next step — like “Book Now.”

Next, you want to create a bit of urgency by discussing “the stakes,” or what they stand to lose if they don’t take action. In the stakes section, briefly agitate the pain points by essentially telling the visitor, “We understand what you’re going through, and it’s costly to ignore it.” You create urgency by including a few bullet points of the visitor’s struggles or risks. They think, “Yes, I *do* want to fix this before it gets worse.” Maintain an emphatic tone in this section and avoid fearmongering to communicate to the reader, “We understand your struggle, and you don’t have to endure it.”

One note before we move to the next section: a high-converting home page doesn't just offer the hero a CTA button and call it a day. Ideally, you want to sprinkle invites to take action throughout the page, especially at natural stopping points. After you've presented the problem, solution, plan, and proof, tell them what to do: schedule that appointment! Repeat the Book Now button in a way that stays with them, no matter where they may be on the page.

Third on your home page is a brief value proposition. Assure visitors that *there is a solution* and highlight the primary benefits or outcomes they can expect from working with you. You can do this via a trio of short statements or icons that encapsulate expected outcomes — the promise of working with you. Together, they paint a picture of the transformation you deliver. It's all about showing them how their life gets better with your services.

Following the value proposition is a short section about you and your practice. Here is where you position yourself as the empathetic expert who can lead them to success. Keep the text patient-focused to simultaneously convey empathy and authority. The goal is to assure them, "you've found the right expert who cares about you." Provide a link to the About page to enable them to easily access more information.

Now it's time to briefly showcase your main services or service categories. Rather than just a generic list, frame them as *solutions to specific problems or goals*. For example, you might have three featured services with titles like "Metabolic & Hormone Balance – Reclaim Your Energy" or "Advanced Aesthetics – Look as Vibrant as You Feel."

Each service deserves a relatable, one-sentence description. Here's where you can provide links to those individual service pages we talked about - and ideally each of those pages features a Book Now button!

People are more likely to act when they know you have a plan to help them. The Plan, another powerful piece of the StoryBrand Framework, is our next section, where you provide an intentional over-simplification of your

process, typically just 3 steps. You can present it as “How to Get Started” with steps like:

1. Book an Appointment
2. Get Your Personalized Plan
3. Thrive!

The Plan section essentially answers the question: “Okay, if I click that Book button, what happens next?” – giving your prospects the confidence to proceed.

Right about now, if they’ve made it this far down the page, they’re looking for proof: proof you are who you say you are and that you can do what you say you can. That’s why we follow up the plan with a section of testimonials. You can simply embed your Google Reviews, or if you have video testimonials, you can embed those instead. Seeing genuine feedback from real patients can tip a hesitant visitor into feeling confident about booking. We’ll talk more about building trust later, but for now give your home page at least one element that communicates to your visitors, “Others trust us, and you can too.”

At this point, it’s most certainly time for that visitor to convert, so if they haven’t clicked the Book Now button, you want them to engage with you in exchange for some immediate value in the form of a lead magnet or list builder. It may be as simple as a downloadable PDF, video content, or an interactive quiz. You can give them options like “Download our Wellness Guide” or “Take our Skin Health Quiz” – an action that’s a lower commitment than booking an appointment but still gathers their info or engages them. By offering something of value for free, you begin to build a relationship with prospects who may need a bit more nurturing.

## **A Word About Visuals & Authenticity**

As you work to differentiate your practice in the marketplace, you must infuse your personality into your website with authentic photos and videos. Showcase your office and your staff, the services you offer, and the products you sell.

Avoid stock photography if at all possible. If it's not entirely avoidable, keep it to a minimum. You don't want your site looking like everyone else's. Real photos and videos give the visitor the chance to get to know, like and trust you, before they even pick up the phone. Imagine someone is at the top of the funnel, searching for a provider and visiting multiple websites, one after the other. If they see the same stock image on two similar sites, it feels inauthentic and the practices start to run together in their mind. If you can display authentic images of you, your team, and your equipment, your trust factor increases and your conversion rate skyrockets.

## **Site Navigation Built For The Customer Journey**

When visitors get lost in too many tabs, drop-downs, or pop-ups, they leave. That's why simplicity in navigation is paramount. Your main menu should be short and clear. If you offer multiple services, group them under a single drop-down tab labeled "Services" rather than listing them all individually.

Every page should have a purpose and a path. Think of it as a story with a beginning, middle, and end. Someone lands on your blog post about IV therapy, clicks over to your service page on the same topic, reads about the benefits, sees a testimonial, and receives an invitation to book — that's a well-designed journey.

Think of your website like a trail, where every path should lead to your front door. Someone might start on your blog, service page, or home page. Regardless of the entry point, their next steps should be obvious and smooth.

To take this one step further, consider what happens after they click “Book Now”? Do they receive a clear confirmation? Do they get a reminder before their appointment? If they cancel, do you have a way to follow up, such as an email newsletter or retargeting ad?

Mapping out this journey helps you identify friction points. The fewer the steps between interest and appointment, the higher your conversion rate will be.

## **Guiding Visitors with Strong CTAs**

A call to action is your website’s way of saying, “Here’s how we can help. Let’s take the next step together.” But not all CTAs are created equal. The most effective ones are clear, specific, and repeated often enough that no matter where someone is on your site, they’re never far from the invitation to act.

Use phrases that encourage momentum, like “Schedule Your Free Consult” or “Start Your Wellness Journey.” Buttons should stand out visually, and appear in the header, within each service page, and again near the footer. Don’t overwhelm the page with options. Instead, make it easy for someone to take the most important next step.

## **Attracting the Right Visitors with On-Page SEO**

Even the best-designed site won’t convert if no one sees it. That’s where on-page SEO comes into play. Optimal SEO demands well-structured content with a clear (and unique!) header or H1, sub headers (H2s) and compelling body copy that includes the keywords people type into their search bar when they are middle-of-funnel and ready to learn more. These keywords should appear naturally in the page title, headings, and first paragraph. Avoid stuffing them everywhere because Google and your readers won’t appreciate it. Instead, focus on clear, useful content that speaks directly to your ideal client.

When each service has its own page that includes relevant keywords, you can rank in the search engine results pages (SERPs) we discussed in Chapter 3 — not just for your home page but for each individual offer. Write meta descriptions (short summaries of a webpage’s content displayed as a snippet below the title on SERPs) that sound human and enticing: “Struggling with fatigue? Discover our personalized IV therapy treatments in Charleston and feel like yourself again.” This small snippet can make a big difference in whether someone clicks on your site in the search results.

Create alt tags (written descriptions of images on a webpage) for your images — not only for SEO but for accessibility. You want to give someone who is vision-impaired the ability to access your content. Make sure your site meets accessibility guidelines.

## **Design for Mobile First**

More than half your traffic will come from mobile devices; therefore, prioritize your mobile site. Check your site on a smartphone. Is the font legible, with enough contrast to see easily? Are buttons big enough to tap with your thumb? Does the booking process work smoothly? If any of those answers are “no,” it’s time for an upgrade. A fast-loading, responsive mobile site improves user experience and enhances your visibility in Google search.

## **Supporting Conversion with Simple Tech**

You don’t need complex software to create a site that converts. In fact, the simpler, the better. Use an online booking tool that integrates with your calendar. Make sure your contact form is short and easy to fill out—name, email, service interest. A follow-up email or text confirmation reassures people that you received their appointment.

If you’re not ready for online scheduling, at least offer a way for visitors to leave their information and request a callback. Bonus points if you can

offer a downloadable resource, quiz, or guide to stay in touch with people who aren't quite ready to book.

Your website doesn't need to be flashy. It *does* need to be clear. When a visitor lands on your site, they should quickly understand what you offer, how it helps, and how to take action. That clarity builds trust. And trust is what turns browsers into buyers.



## **Chapter 5 Salt Shaker: Is Your Website Actually Inviting Your Ideal Prospects In?**

Take a moment to view your website through the eyes of a potential client or patient who's visiting for the first time.

Answer the following questions honestly:

- Within five seconds, is it clear who I help, how I help them, and what to do next?
- Is there a visible, confidence-building path to book from every page?
- Do my pages feel welcoming and human, or cluttered and confusing?
- If someone landed on my site at 10 p.m., would it gently guide them forward or leave them guessing?

And last but not least:

***If my website were a front-desk team member, would I trust it to book appointments for me?***

Shake Things Up This Week

Choose one high-traffic page (your Home page, a Service page, or a popular blog post) and rewrite it according to the formula I described in this chapter. Clarify your message, remove distractions, and make sure a “Book Now” option appears on every page. If you do not have a value proposition in the form of downloadable lead magnet (a checklist or guide), video, or interactive quiz for prospects who are not yet ready to convert, consider creating one.



*Scan the QR code for my Website Optimization Checklist and get a step-by-step guide to creating a high-converting website.*

# Chapter Six

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## Create Raving Fans for Life

There's a moment every wellness practitioner recalls fondly: a client comes in for her second appointment and tells you how many compliments she got, or that she feels as if she could conquer the world. Loyalty begins in that moment, that feeling of genuine delight. It doesn't grow on its own; you cultivate it by the way you show up for your clients, the care you put into their experience, and the simple touches that turn one satisfied moment into a long-term relationship.

You don't have to be flashy or perfect to create raving fans; you just need to be thoughtful, intentional, and consistent. And once you understand how loyalty really works in this industry, you'll realize something incredible: it's one of the most natural and fulfilling aspects of your business.

### **In the Wellness World, Loyalty Equals Emotion**

Retention relies on profound emotion in the med spa and wellness world. Your clients aren't buying an object they'll take home and use; they're trusting you with their face, health, ability to move, confidence, and aging journey. When they sit in your treatment rooms, they're vulnerable in a deeply human way. And when you handle it with warmth and connection, that vulnerability forms the foundation for a unique kind of loyalty.

This is where Salt Marketing's RAVE system comes in. We teach it inside our Salted Edge Masterclass because it's simple, adaptable, and incredibly

effective. But more importantly, our RAVE system fosters loyalty naturally, in alignment with your personality.

## **Salt Marketing's RAVE System, Simplified**

RAVE stands for **R**ecognize, **A**sk, **V**alue, and **E**levate. Don't worry, you don't have to memorize anything or execute the system in a rigid order. Think of RAVE as small shifts in your interactions with clients — tiny actions that make them feel like they've discovered the one provider they never want to leave.

Recognition, for instance, is one of the simplest things you can offer, yet so few businesses truly practice it. Recognizing a client means seeing them beyond their appointment slot to remember their name, preferences, and comments about an upcoming significant event in their life. It's noticing when their skin looks especially radiant or when they've made progress toward their goals. Recognition is free and takes mere seconds. Yet it's the difference between a client who says, "They're fine," and one who says, "I love going there; they always make me feel so welcome."

The second part of the RAVE formula is to Ask. Once you train yourself and your staff to recognize that pivotal moment in a client's excitement or progress, it becomes much easier to ask them for the things that help your business grow: feedback, a review, or maybe even a referral. When someone is already saying, "I feel amazing," it's completely natural to respond with, "I'm so happy to hear that. If you ever want to share your thoughts in a review, it would help so many people find the right care." Asking becomes a conversation rather than a transaction.

The next piece, Value and Reward, is where many practitioners unintentionally drop the ball. When someone refers a friend or family member, you must acknowledge it in the form of a shout out on social media, a quick thank-you note, or a warm message at their next appointment. These actions stick with them. Add a little reward to their lives with an account credit, and now that client feels super valued — not only did you acknowledge their efforts and loyalty, you rewarded it.

And finally, Engage, the often-overlooked step in the RAVE system. Keep in mind, referrals are not just about transactions, but about creating a culture. Engage your advocates by making them feel like part of something bigger. It could mean creating a formal referral program with ongoing benefits or simply keeping them in the loop about how their referrals are making a difference. You could feature top referrers in an email or on social media. And going back to rewarding them, host an exclusive event or appreciation day for advocates to meet and greet and talk with one another. This sense of belonging makes your advocates feel invested in your success and eager to continue supporting you.

When your clients feel like *insiders*, they'll go out of their way to keep spreading the word.

## **How Automation Supports Loyalty (And Humanity)**

Here's where things get really fun: you can support all of these efforts with a little bit of automation, just enough to prevent the important pieces from slipping through the cracks. Imagine this: every client who comes in receives a warm follow-up email, asking about their experience. It's friendly, simple, and genuinely caring. When they click to tell you they had a fabulous experience, they automatically receive a second message thanking them and inviting them to share it in a review: nothing pushy, just a natural extension of the joy they already expressed.

And when they do leave a review, your system automatically sends a warm, grateful note and invites them to refer a friend who can experience the same fantastic results they've experienced.

On the other side of that flow, if a client reports that their appointment did not live up to their expectations, an entirely different message triggers that gently asks what went wrong and assures them you genuinely want to make it right. Most unhappy clients don't want compensation — they want to be heard. This little bit of automation gives them space to share without feeling awkward and allows you the opportunity to turn an off day into a chance for connection.

Nothing about this process feels automated to the client. It feels caring, attentive, and thoughtful. And it quietly grows both your positive reviews and the number of referrals you receive, without you having to chase either.

## **Staying Connected Between Visits**

Between appointments, you have a unique opportunity to keep clients connected without overwhelming yourself or them. Once again, the simplest approaches tend to be the most effective.

A warm semi-weekly email newsletter offering tips, seasonal reminders, or quick updates keeps your voice in their world. Clients love hearing from the businesses that care for them, especially when you're offering value rather than pushing promotions. Between visits, stay present in your clients' lives in a positive, value-added way. Engage them socially, educate and inspire them, celebrate them, and create structures (like memberships) that bind you together. When clients feel connected to you even when they're not physically at your location, you've achieved a different kind of status your competitors can't touch.

Celebrating your clients is another beautiful way to deepen loyalty — birthdays, treatment anniversaries, big milestones, or even a simple acknowledgment of how far they've come on their wellness journey. These celebrations can be automated or done manually, but the effect is always the same: clients feel noticed and appreciated.

You can also offer a few in-person connection touchpoints throughout the year. Nothing complicated; maybe a small open house, an educational workshop, or a preview of a new service. Such touchpoints give clients an opportunity to feel like insiders, to feel like part of a community. That sense of belonging often becomes one of the strongest factors in long-term loyalty.

## **Maximizing Lifetime Value and Loyalty: The Big Picture**

By now, you have a toolbox full of strategies – the RAVE framework, automated follow-ups, community events, consistent communications, and maybe even a membership program. Let's take a step back and look at how all these pieces work together to optimize the lifetime value (LTV) of each client and solidify their loyalty.

Lifetime Value is essentially the total revenue a single client generates during their relationship with you. When you focus on retention, you're not just getting one more appointment from that person – you're potentially doubling, tripling, or 10x-ing what they contribute to your business over time. More importantly, a loyal client often brings even more value through referrals, as we've discussed. So, a client who might spend \$2K a year on themselves could actually be worth \$6K when you factor in two friends they refer who also become clients. And if they stay with you for five years...you see where this is going. Retention is *everything*. It's not an exaggeration to say that the health of your business long-term depends on the lifetime value of your clients.

Within wellness and aesthetics, the research is clear: clients return to places where they feel known, cared for, and supported. They return to consistency. They stay when communication feels warm and helpful. They commit more deeply when their provider educates them and celebrates their progress. And they refer at far higher rates when they feel emotionally connected to their practitioner.

Often, it's the smallest things, not elaborate programs or complicated strategies, that create the most profound loyalty.

## **A Business Built on Raving Fans**

As you finish this chapter, I want you to imagine the future version of your practice, filled with familiar faces who trust you, refer friends without hesitation, and celebrate their wins right alongside you. This version of your

business doesn't rely on scrambling for new leads, because your existing clients fuel the majority of your growth, creating stability and confidence.

In the big picture, building a base of raving fans transforms your business from a revolving door into a thriving community. Instead of constantly running on the marketing hamster wheel for new leads, you get to slow down (just a tad) and enjoy the relationships you've cultivated – all while your revenue grows more predictably. It's a beautiful thing.

Now you have the ingredients you need to cultivate raving fans — and you are absolutely capable of weaving them into the life of your practice. One step at a time, with warmth and intention, you'll nurture the kind of relationships that infuse your business with success and fill your heart with the joy of remembering why you started your practice in the first place.



## **Chapter 6 Salt Shaker: Where Could Loyalty Grow Just One Degree Deeper?**

Think about your favorite client, the one who lights up when they see you and tells their friends, “You have to go there.”

Ask yourself:

- What's one small way you already recognize them?
- Where could you ask for feedback, a review, or a referral more naturally?
- How do you show value when someone sends you a new client?
- And how could you engage them just a little more between visits?

You don't need a massive loyalty program or a polished system to start, just intention.

## **Shake Things Up This Week**

Choose *one* client touchpoint — after an appointment, between visits, or during a milestone — and add a moment of recognition or gratitude. A kind note. A thoughtful follow-up. A simple acknowledgment.

Remember, you don't create raving fans through strategy alone, but in moments when you make people feel seen, celebrated, and genuinely cared for.

# Chapter Seven

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## Automate

### Work Smarter, Not Harder

**A**s a wellness practitioner, your heart lies in helping people feel better, move better, and live better. But if you're honest with yourself, most of your days consist of calendar reminders, inboxes full of "Did you get my message?" and an endless, self-perpetuating to-do list. Yet you started your business to serve, connect with, and help your clients or patients thrive — not to spend your days playing admin.

Enter automation.

It may sound like a techy word, but in wellness, automation enables you to communicate with the people who need you, even when you're working with a client, engaging in self-care, or spending time away from the office. Imagine being responsive *without* being chained to your laptop because your follow-up happens automatically, gently guiding your clients or patients, while you're free to focus on what you truly love. It's not a fantasy. Automation makes it possible.

Why does automation matter in a wellness business?

- It frees you to **focus on client care**, not chasing leads or rewriting follow-ups. The more you automate the client or patient journey, the more you remain in your zone of genius: healing, coaching, guiding.

- It dramatically **reduces manual follow-up**, to prevent you from losing leads because you ran out of bandwidth, energy, or time. Often, your best prospects fall through the cracks simply because you couldn't hit "send" or "post" fast enough. Automation solves this problem.
- It keeps you **responsive even when you're not "on."** Your business runs like a well-oiled machine, quietly delivering the nurture and care your prospects and clients need, 24/7.

In this chapter you'll learn how to leverage automation across your client journey — from the very first moment someone shows interest, through onboarding new clients and patients, and into the retention phase where you build raving fans who love you, stay with you, and refer others to you. We'll walk step-by-step through:

- Automating **lead follow-up** to convert more of your leads into paying clients.
- Automating **client onboarding** to make each new client feel seen, supported, and professionally taken care of from day one.
- Setting up **"always-on" campaigns** for nurturing, retention, referral and re-engagement that work while you sleep, so your business no longer requires your touch on everything.

By the end of this chapter, you'll have a clear playbook for your automation. If you're just getting started, you'll gain the confidence to implement it with simple tools and templates immediately. If you have already established some automation for marketing, sales, or operations, we'll talk about how to optimize those flows for maximum return. Let's make your practice run smarter, so you can focus on your goals.

## Mindset: Getting Your Head Right on Automation

You probably entered the wellness business because you felt a calling to help people heal, feel stronger, and live more fulfilling lives. Yet somewhere along the way you found yourself juggling calendars, chasing inquiries, reminding folks about bookings, sending follow-up texts at the end of the day, and wondering when you became “digital admin” instead of the practitioner you envisioned. This is exactly why automation matters. It’s time to invite it in, on your terms.

Let’s start by clearly defining automation. In your practice, automation steps in when someone expresses interest, completes an appointment, or falls silent for a few weeks. In these situations, automation sends out the right message at the right time. It’s the warm handshake, friendly check-in, or helpful next step, delivered whether you’re mid-treatment, in session, or even taking a weekend off. It is *not* a cold robot blasting “Dear valued customer” messages into the void. Done right, automation fosters connection.

If you imagine automation as your quiet, dependable assistant, your mindset and your practice will begin to shift. With your voice, warmth, and unique care remaining at the heart of your business, the system simply ensures that nothing falls through the cracks. Instead of scrambling to send a follow-up after a discovery call or manually reminding yourself to check in with a client who hasn’t returned in eight weeks, you design what should happen once, then the system delivers reliably. More importantly, you reclaim your time to do what you truly love.

That said, you’ll want to make a few commitments upfront:

First: clarity of journey. Who is your ideal client, and what stages do they move through in your practice? From curious visitor → lead → booked client → active participant → loyal advocate — each stage deserves its own thoughtful touch.

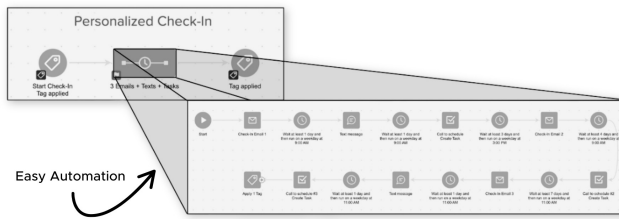
Second: willingness to map flows. It might feel a little techy, but the effort you put into sketching “If they download my guide, then send this email; if they don’t book in three days, then send a reminder,” will pay off in serenity and conversion.

Third: just a little tech willingness. You don’t have to become a software guru overnight, but you do need to choose your tool, get comfortable with the basics, and move beyond “I’ll figure it out someday.” The right platforms help you organize your contacts, trigger messages based on behavior, and track results over time.

Of course, as a wellness professional you might harbor some hesitations. Perhaps you worry that automation will make your voice feel robotic, or that your clients will receive messages that sound canned. The good news: when you start with your voice and write the messages as you would speak in a session, reference the client’s name, and mention their goal or concern, you eliminate the risk of sounding robotic.

A lack of automation poses a far greater risk to your practice when you inadvertently ghost a prospective patient or client, miss a follow-up with someone who really needs nurturing, or lose the warmth of consistency. Automation guarantees that your voice resonates every time. If you’re truly concerned about tech overwhelm and not having the time to learn another platform, I want you to consider this: investing one afternoon now will save you dozens of hours later. Automation is not a magic wand...it requires careful planning, implementation, and ongoing optimization.

Let this be your moment of freedom: starting now, you can show up fully as the healer, the coach, and the guide, leaning on automation as the behind-the-scenes system that supports you. With the right mindset, you’re ready to map out the journey.



## Map the Client Journey Before You Automate

Before you build any automation, it's a good idea to map out your future ideal client or patient's experience with your practice. If you skip this foundational step, you risk creating automation based on a partially conceived journey, resulting in automated chaos that doesn't convert.

Picture this: A prospect expresses interest in your wellness service, you send a generic "Thanks, we'll be in touch" email, and then nothing happens for days. Consequently, the lead finds a competitor who meets their needs. For another new patient, you send a booking reminder, but it goes out too early, or for the wrong service. When you haven't intentionally defined the journey, your automation will simply replicate (and like we said, amplify) those gaps, delays, and mismatches.

By contrast, building an explicit map of the path your patient takes gives you the framework to see each stage; define what you want the person to think, feel, and do; identify your touchpoints; and automate thoughtfully. A good Customer Journey Map allows you to visualize the process of winning and wooing your clients and patients, long-term.

For a wellness practitioner, your clients or patients move through the following stages: **Awareness** → **Consideration** → **Conversion** → **Loyalty** → **Advocacy**.

- Awareness: your prospect first learns about you

- Consideration: your prospect evaluates whether you might be the support they need
- Conversion: your prospect becomes a client or patient
- Loyalty: they had a great experience and return to you
- Advocacy: they refer or speak about you.

Visualizing that full arc helps you understand *what* you deliver and *how* you deliver it.

In Part Three, we'll work through each part of the customer journey map in detail, and I've included a Journey Map template you can use to think this through. For now, just think through some of the basics for your clients or patients at each stage:

- What action they're taking
- What touchpoint they interact with
- What they might be thinking
- What they might be feeling
- What your opportunity is — where you step in to move them forward

Suppose you provide body composition analysis for 50+ executives who want to maintain their energy and strength: a prospect becomes aware of your solutions after reading your blog, explores your website, and perhaps books a discovery call. They attend the call (conversion), complete the analysis and engage in your program (loyalty), and after seeing results they refer a colleague (advocacy). Map out each of those moments.

The idea here is to identify friction points that could cause issues with customer engagement to gain an understanding of how to close those gaps

*and* automate the process. Once you've populated your map, review it again and ask: *Which of these touchpoints could be automated?*

- For example: when they fill out a “Download our free guide” form, an immediate email goes out (and later a reminder if they haven't booked).
- After the first session, an automated message checks in, asks a quick question, then offers the next booking link.
- 60 days of inactivity trigger a “We miss you” check-in, and if no response, a special offer or survey.

At this point, “business process mapping” comes into play — simply put, you're documenting *how* things happen in your business: the steps, the decision points (“if they book or if they don't”), triggers, and hand-offs. This simple but powerful documentation becomes your automation blueprint. Now, we're ready to build the actual automation for lead follow-up. Mapping provides the clarity; automation handles the delivery. Together they become the system that works behind the scenes...while you're doing what you love.

## **Automating Lead Follow-Up to Convert Prospects Faster**

One of the biggest reasons many practices stall is a lack of timely follow-up. A curious prospect fills out a form, receives a quick “Thanks for reaching out,” and then... nothing. Days might pass, enthusiasm wanes, and that opportunity slips away. In fact, marketing data shows that without nurture, most leads simply go elsewhere. This phenomenon has profound implications for you the moment someone carries energy. If you honor it quickly and thoughtfully, you're much more likely to convert. If you delay or miss it, you lose momentum.

Let's walk through a clear, practical workflow you can implement in any automated system.

1. **Lead enters the system.** It could happen when someone downloads your free guide, books a discovery call, or completes a lead-capture form on your website. At that moment your system should tag them as a new lead and trigger the next action.
2. **Immediate confirmation email + next-step invitation.** As soon as they opt in, you send a warm message: “Thank you for your interest! Here’s your free guide (link). I’m excited to take this next step with you.” In that same email, you invite them to book a short discovery call (or whatever your next step is) with a friendly “If you’re ready to get started, click here to pick a time.”
3. **Automated welcome sequence—six touches over the next few days.** Think of it as your value bundle followed by a clear call to action.
  - **Email 1: Deliver Lead-Gen Asset.** Thank them again, deliver the promised resource, mention how you hope it helps, and preview what’s to come.
  - **Email 2: Problem/Solution.** Now you gently remind them about the problem they’re facing and offer the solution you provide. Invite them again to book a consultation.
  - **Email 3: Testimonial/Story.** Story matters. Share a client success story and again, always include a call-to-action: “We’d love for you to be our next success story. Let’s talk.”
  - **Email 4: Overcome an Objection.** Address a common barrier: “I know you may think ‘I don’t have time,’ or ‘I’ve tried this before and it didn’t work.’ Here’s what I say, and how we approach it differently.” Again, end with a friendly next-step invitation to make it clear what they need to do: book a call.
  - **Email 5: Paradigm Shift.** This is a subtle shift in thinking: “You used to think fitness was about pushing harder, doing

more. What if instead we focus on smart metrics, recovery, longevity, and creating a body that serves you at 70 and beyond?” Tie this thinking into how your approach differentiates you!

- **Email 6: Ask for the Sale.** At this point you’ve delivered value, built trust, addressed objections, told stories, and shifted their thinking. Now be direct, make it easy, low friction.

4. **Pay attention to their personal journey:** If they book with you, stop sending the welcome sequence encouraging them to book! Move them into your onboarding automation, which we’ll cover next. If they don’t book within a defined timeframe (say 7–10 days), move into a longer-term nurture list or send a “special offer” or “free audit” message to restart engagement.

When writing your automation emails, keep one simple guiding thought in mind: speak as if you’re talking to someone who’s curious, hopeful, ready, and deserving of your warmth. Let your tone and personality shine through. That means no “noreply@” blasts that feel like they arrived by accident. Instead, each message should infuse your distinct voice clearly and humanly.

And while you’re showing up, don’t disappear into their inbox with a firehose of messages. The flow should feel gentle, paced, and respectful of their thought process. Think of it as a helpful conversation over a coffee, not a high-speed chase down the highway.

Behind the scenes, keep a friendly eye on how your emails are behaving: are people opening them? Are they clicking? Are they booking? If you notice one message isn’t pulling its weight, don’t force it, adjust it. Try a subject line tweak, change the tone a bit, or test a different call-to-action. It’s like adjusting your workout: small change, better result.

Finally, remember that your clients don’t all fit into the same mold. A high-performing executive who wants longevity and vitality will respond differently than a student athlete chasing performance, or a well-

ness-minded retiree looking for stability and health. Speaking in the language of each group, acknowledging what keeps them up at night, and relating to the wins they hunger for makes your messages land with relevance. By automating your lead-follow-up in this intentional way, you're not sending cold junk but delivering your best self, consistently, to each prospect. You're nurturing while you sleep. And you're capturing opportunities that might otherwise slip away. In the next section we'll move into client onboarding to ensure that once someone says "yes," your process greets them perfectly.

## **Automating Client Onboarding**

Your practice probably already has an established onboarding process with forms to fill out, intake paperwork, and maybe a welcome packet or checklist. That's all important. But think of your client onboarding as the beginning of a *relationship* and not simply transactional. This is the phase where you don't just get the client "in the system"; you assure them they're *in the right place* and introduce yourself (and your story). Here you affirm their decision and start building the trust that moves them from "just" a paying client into a raving fan.

When you create a thoughtful onboarding experience, you set a tone of care and professionalism from day one. It improves retention because the client feels seen and supported, and it reduces administrative burden because your automation handles the routine while you show up meaningfully.

What does a great relationship-building onboarding look like? The moment a new client books, your automation triggers a warm welcome email: "Thank you for choosing [Practice Name]. I'm [Your Name] and I'm excited to work with you. Here's what to expect..." Include links to educational information on your website, including videos, your podcast, articles or other resources.

Then, one day before they're scheduled to come in for the first time, send them a text message to instill confidence. After they complete their first

session, don't just acknowledge it, celebrate it! Send a "Thank you" email: "It was great working with you today—here's what we discussed, here's your next step, and here's what to expect from here." This email also gently invites feedback or questions.

Use online forms to automatically capture their goals, preferences, and concerns. Use automated scheduling links so they can easily book follow-up sessions. Automated reminders (email or SMS) reduce no-shows. Inside your system, create automated internal tasks or notifications to enable you and your team to see when a new client has finished onboarding and is ready for the next phase.

Make the process feel human. Consider recording a brief video or audio note saying "Hi, I'm [Your Name]—looking forward to working with you." It doesn't have to be fancy; just you being you. Avoid cold formality. The tone should be: "You're in good hands, let's get you the results you came for."

Going back to your customer journey map, list each touchpoint (booking → welcome email → reminder → survey → post-session email → follow-up scheduling). Map out what you'll say, what the client will receive, and what you want them to think and feel. Continue to use your map to build your automation flow.

In short: when done right, onboarding is your chance to "seal the deal" emotionally, not just financially, and initiate the journey toward a client who not only stays, but loves what you do and becomes an advocate, raving to others about their transformation, thanks to you.

## **Automating Client Retention**

In any wellness practice, retention drives profit. Once someone becomes a client, your job is just beginning. Automating smart, meaningful touchpoints keeps your clients and patients engaged, feeling seen, and moving forward with you. The flip side? If you stop communicating or treat them like afterthoughts, they'll start drifting — which means lost revenue, re-

ferrals, and momentum. Why should you automate your retention efforts? There are two reasons: one, we all know that it is easier to increase revenue from existing clients than it is to get new ones...and two, without consistent, personalized engagement, you'll find that your clients and patients don't give dramatic feedback; they simply drift away quietly.

An important concept for understanding the power of retention is client or customer lifetime value. Average Lifetime Value (or LTV) is essentially the average amount of revenue each client brings to your practice over the entire time they remain a client. It goes far beyond measuring one session or one purchase to capture what they spend while they remain your client.

Knowing this number gives you power: you can reverse-engineer how many clients you need, how much you can afford to spend to acquire them, and how to structure your services for the best return. To determine your practice's average LTV, first calculate your average revenue per client over a given period, as in the following example

In the last 12 months, your total revenue was \$1,500,000. You worked with 402 clients → average revenue per client =  $\$1,500,000 \div 402 = \$3731$ . From there, use your practice records to determine how long the average client stays with you. Let's say it's two years. We multiply annual average revenue per client (\$3,731) by your average retention period (2 years) to arrive at an average LTV of \$8208. It's easy to see how retention can affect your revenue over time!

Here are some examples of automated follow up that can help you improve retention rates and increase customer lifetime value (LTV):

- Appointment and recall reminders: Show-up reminders are crucial but be sure to include "what to expect" messages with them. If they fail to book their next appointment, sprinkle in a little of what we call "the stakes" - help them see what can happen if they don't return.
- Personalized celebration: When you take the time to acknowledge milestones (their first session, six-month check-in, their birthday,

their anniversary), you reinforce personal connection.

- Referral asks: When someone's had a win, automate the RAVE system, "If you know someone who could benefit like you did, I'd love to help them—here's a simple way to refer."
- Upsell: As a program or treatment protocol ends or their momentum is strong, send the next-step offer — "You've done amazing work, ready to take it further?"
- Seasonal or challenge campaigns: Consider offering a "6-week performance refresh" for athletes entering a new season, or "longevity audit" for folks turning 50. These campaigns keep your services fresh, and your client actively involved.

To pull this off, use tagging and segment your database so your system knows who is an "active client," who has "completed X program," who is "inactive > 60 days," etc. That kind of segmentation allows your messages to land in the right context.

Best practice? Keep your tone friendly, filled with gratitude, and service oriented. Provide value first (a tip, a resource, a recognition), then be clear about next steps that will guide them to success. Your automation should feel like your best friend sending a thoughtful text — not like a generic marketing blast.

## **Automation Tools, Tech, and Integration Made Easy**

You don't need a dozen different platforms, a tech-army, and multiple logins to make your practice hum. What you really need is one central system, a CRM/automation platform designed to handle the heavy lifting to allow you to stay in your zone of genius: guiding clients toward optimal health, better performance, and more fulfilling lives.

Let's talk about what this kind of system can do for your wellness business, how it supports the "Get Found, Get Booked" mindset, what features matter most, and how to pick the right level for your current situation.

Picture a tool that captures a new lead the moment they tick the "Yes I'd like the free guide" box, sends them a warm welcome message, schedules a discovery call, automatically reminds them, tags them based on their interest (student athlete? stressed executive? longevity-focused?), and then once they become a client, handles onboarding, sends session reminders, tracks their engagement, invoices them, and triggers follow-up campaigns for retention and referrals. That's the kind of end-to-end power we're talking about. This kind of platform is not just an email tool but an all-in-one CRM that helps wellness practitioners manage leads, clients, follow-ups, appointments and payments.

This type of tool supports your Get Found phase (capturing leads, building your list, tagging interest), your Get Booked phase (encouraging prospects to book, triggering updates, automating booking flows), and your Get Loved/Retention phase (client/patient onboarding, surveys, follow-up, review & referral asks).

When evaluating your tech stack, make sure your chosen platform offers:

- Robust capabilities like automated tasks for you and your team, a sales pipeline, segmentation, and of course the basics like email, texting, phone.
- Payment processing and invoicing if you choose to use it
- Segmentation within automation workflows (to treat the different client types - and the different actions they take - differently)
- Compliance features (HIPAA or health-data safeguards, if you handle sensitive info)
- Integrations with other tools you use (forms, calendars, website)

These features allow you to streamline your operations and keep your system lean. Without them you'll end up cobbling together multiple tools and chasing logins (and energy).

The magic happens when your forms, booking calendar, CRM/automation tool, and email/SMS tool all “speak” to each other. For example: someone completes your free guide form → the CRM tags them as “lead” → automation triggers welcome sequence → scheduler sends calendar link → lead books call → on booking the tag moves to “booked lead” and triggers an onboarding email. That smooth, silent flow means fewer manual hand-offs and slip-throughs.

Here's are some tech automation flows you can use:

- Form on website → capture lead info Tag lead in CRM → trigger follow up
- Lead books session via calendar link → CRM tags “booked” → trigger onboarding flow
- Patient completes appointment → CRM tags “active client” → trigger review & referral automation
- Client completes program or becomes inactive > 60 days → tag “reactivate” → trigger re-engagement campaign

When you pick one tool, implement it intentionally, and integrate your flow, you'll begin to feel sweet relief because you're back in your zone of transformation, helping clients, changing lives, and being the practitioner you signed up to be. Let the tech support your brilliance.

## **Measure, Refine and Scale Your Automation**

Automation is *not* a “set it and forget it” deal. It's more like planting a garden. You water it, check the soil, pull weeds, prune the branches, and then when the time is right, you plant new seeds. In your wellness practice

it translates to monitoring the performance of your automations, then refining and scaling them to truly serve your clients and business.

Basic metrics to monitor include:

- Open rates and click-throughs (are people opening your messages? Are people clicking?).
- Booking conversions and retention/churn (are leads turning into clients? Are clients sticking around or slipping away?).
- Referral rate (are clients telling others about you?).
- Automation jumps or failures (did the correct tag trigger? Did the workflow stop because something was set up improperly?).

These are the signals that tell you whether your system is humming or sputtering.

When you're starting out, keep things simple. Choose a few key metrics you'll focus on: maybe open rate, booking conversion, and retention. Integrate your analytics so you can see them in one place. Experiment with small changes (for example, a different subject line, send time, or message copy), and watch how those affect your metrics. This kind of testing lets you refine smartly without getting overwhelmed.

Your "always-on" campaigns (the retention flows, referral asks, revisit sequences) become your baseline. Once they are working reliably, you can add new automation, perhaps in the form of a seasonal challenge, an upgrade offer, or a special program. But only scale when the core automations are stable and performing. Trying to build too many new flows while your foundation is shaky can actually slow your momentum.

As you grow, you may move from "one-to-many" automation (same message to many) to "one-to-one at scale" personalization: messages that adapt based on your client's segment, behavior, and past purchases. That tran-

sition is where your automation matures and becomes a true lever for growth.

You've now walked through the heart of how automation fits into your wellness business as a warm extension of your care, voice, and journey alongside your clients and patients. When you start with your client journey map and adopt the right mindset — one of service, consistency, and scaling impact — automation becomes your trusted ally.

Automation enables you to serve more people, stay consistent in your message and touchpoints, free up mental space from chasing leads and reminders, and ultimately scale your impact so you're not just working harder, you're working smarter.



## **Chapter 7 Salt Shaker: Let Automation Give You Your Life Back**

Pause for a moment and ask yourself, “*What would my days look like if nothing slipped through the cracks?*”

How different would life be if follow-ups happened automatically, onboarding felt seamless for every new client, and your practice remained responsive, even when you unplugged?

This week, choose one place where automation could support you instead of draining you.

Start small:

- Map one client journey (from first inquiry to second visit).
- Write the exact message you *wish* you always had time to send.
- Commit to setting up just one automated follow-up or reminder.

JENNIFER ORECHWA

Automation protects your care by ensuring your voice, warmth, and guidance show up consistently, even when you can't. Let your systems handle the busy work, so you can stay in your zone of genius, healing, guiding, and transforming lives.

Work smarter. Breathe easier.



*Scan the QR code above for a free 14-day trial of my favorite HIPAA-compliant Automation software for wellness practices!*

# Chapter Eight

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## Measure & Scale

### Know What's Working

**A**t the core of your wellness practice lies a powerful truth: transparency matters as much as passion and care. Creating a data-driven practice does not require giving up your soul or your instincts about what's right for you; it means bringing your wisdom to life with actionable insights to allow you to serve more people, make better decisions, and expand your impact.

Many wellness practitioners believe the only number that matters is revenue. And yes, as the lifeline of your business, revenue is critical. However, if you stop at revenue, you miss the hidden goldmine of opportunities that live in your marketing metrics: the leads you could've booked, the clients you could've retained longer, and the referrals you never asked for because you didn't know when to ask.

When you begin to track and understand your numbers, such as which lead generation efforts drive the most new bookings, the cost to acquire them, the percent who stay with you, and the referrals they make — you move into new territory. You transition from doing things the way you've always done, to doing things that are *designed to work*. You become a strategist for growth in addition to being a healer.

In this chapter, we'll explore how you can measure the right metrics, refine your processes based on what the data tells you, and scale your marketing

and automation to make your business consistent, efficient, and expansive. You'll learn to view your business like a journey with signposts, trading guesswork for guided steps.

## Identify Key Metrics & Ignore Vanity Metrics

We often tell our clients that hope is not a strategy — you can't simply hope your marketing works — you must track how well it works. Yes, revenue is the ultimate destination. But the road to revenue is paved in data. And if you ignore those road signs, you'll drift off course or miss opportunities entirely.

Let's be honest: many practitioners become enamored with big, shiny numbers. Likes. Followers. Email opens. While what we call *vanity metrics* often feel satisfying, they don't move the needle on growth. They look good on the surface, but don't necessarily deliver paying clients or support retention. The real metrics — the ones that matter — align directly with your business goals: client acquisition, conversion, retention, referral, and operations. These numbers tell you *what to do next*.

Remember the formula we taught earlier for average lifetime value? Using that number, you can also reverse-engineer what you need to reach your goals. Determine your revenue goal for the year, then divide it by your average client value to determine how many new clients you need. From there, you can work backwards to leads required, website traffic required, and so forth. Once you understand these metrics, you can choose measurable markers along the way that indicate whether you're on track.

Here are the four clusters of metrics we recommend for wellness practices — each tied to a stage in your business and your marketing effort:

1. **Client Acquisition & Retention Metrics** – These help you see whether your efforts are effectively bringing in and keeping clients.
2. **Conversion Metrics** – These show how well you're turning in-

terest into bookings, and bookings into paying clients.

3. **Community / Referral Metrics** – These reveal the strength of your client base, and how well your clients are loving you (and sending others).
4. **Operational / Efficiency Metrics** – These uncover how well your practice runs: Is your calendar full? How many no-shows do you have? How profitable is each service?

For example, suppose you track:

- Website traffic
- Lead-acquisition rate
- Bookings per month
- Lead-to-client conversion rate
- Cost per acquisition (CPA)
- Service upsell rate
- Net promoter score (NPS)
- Lifetime value (LTV)
- Utilization rate
- No-show rate
- Service profitability

Each metric provides you with a necessary piece of the puzzle. Metrics such as client retention rate, service utilization per client, and average revenue per client hold particular importance in wellness settings.

Here's your starting point: identify your “north-star” metric (often new-client revenue or lifetime client value). Then pick three to five supporting metrics you'll track monthly to determine if you're on pace. Ignore the rest for now.

When you track the right metrics, you'll begin to see meaningful patterns. You'll know which campaign is working, which service is under-performing, which client types are the most profitable. And that clarity will allow you to scale confidently, rather than blindly.

## **What Your Numbers Mean**

Tracking metrics is the first step. Knowing what to do with them separates the steadily growing wellness practices from the wellness practices that spin their wheels. In this section we'll walk you through how to conduct a monthly marketing audit — your structured, repeatable system for uncovering what's working, what isn't, and how to make real decisions from your data.

Your marketing strategy is like a living, breathing organism. Every 30 days you'll want to step back, look at the data, and refine your approach. If you don't, you'll risk continuing to pour time and money into efforts that aren't moving you toward your goals. A marketing audit will help you identify the biggest strengths and weaknesses in your current strategy. Understanding your numbers lays the foundation for future decisions.

We'll use what we call the Momentum Matrix—a 5-step audit framework designed for wellness practices. Let's walk through it:

### **One: Gather Your Core Metrics**

First, pull together the key data points you decided to track. These are the numbers that reveal whether your marketing is moving the needle: visitors, leads, bookings, conversion rates, referrals, retention, operations.

## **Two: Look At Attraction & Conversion**

How well are you bringing people in? And how well are those people becoming clients? If not, where's the breakdown — traffic, lead magnet, booking process?

## **Three: Review Client Retention & Referrals**

The flipside of acquisition is engagement and advocacy. Are your clients staying longer than average? Are they referring others to you?

## **Four: Check Your Operations & Service Performance**

The goal of marketing extends beyond client acquisition to measure how well your practice handles new clients. How full is your schedule (we like to see about 85 % utilization)? What's your no-show rate (you want under 15 %)? How many people flow through your automation sequences: are they reaching the goal you set (booking, onboarding, re-booking)?

## **Five: Adjust and Implement Your Revised Strategy**

Based on what you discovered: What will you *keep* doing? What will you *stop* doing? What will you *start* doing?

By looking at your numbers regularly, you turn guesswork into growth. And because you're doing it on a schedule, you're building momentum rather than chasing fire-drills. Over time, your metrics won't simply look in the rear-view mirror, but also help you see what's ahead, right out of the windshield. And that kind of clarity transforms how you grow your practice.

## **Scaling Strategically**

Scaling your wellness practice in a way that feels smart, sustainable, and aligned with your values involves doing *the right things* with the right foundations already in place.

Imagine waking up to new leads in your inbox, booked appointments on your calendar, and happy clients receiving follow-up, even though you weren't manually sending each message. That's what happens when your systems do the heavy lifting. You've already mapped the client journey, set your automations in motion, and now you want to rinse and repeat with confidence.

The mindset shift? You're *not* the rock-star hero in every moment. Your system is. When a lead sees your email sequence, books a session, gets the right reminder, and shows up feeling ready, your system worked as intended. You get to show up for the moments that matter most: the session itself, the transformation story, and the referral conversation.

Start with your automated lead-attraction funnel. Make sure when someone opts in, they receive the lead magnet, get nurtured, and are guided toward booking with you — no manual chasing required. Make your booking system seamless: calendar integration + reminder sequence = less no-shows, more client flow. Post-consultation, make sure your system seamlessly moves them into the client onboarding and retention path. When implemented properly, leads turn into clients, and clients turn into raving fans, without you micromanaging every step.

Now that your systems are humming, it's time to talk about growth, with profit in mind. In my experience, many wellness practitioners fall into the trap of growing fast *and* inefficiently. Yes, they attract more clients, but they also experience skyrocketing costs and a disappearance of quality time that leads to creeping burnout. You don't want that...and I don't want that for you.

Instead, focus on the following:

- **Increase Customer Lifetime Value (LTV):** Introduce higher-value services such as memberships or premium packages. Rather than chasing lots of new clients, deepen the value with the ones you already have.

- **Expand Capacity without Overworking:** When you hit demand, hire strategically, don't just add more hours. Outsource admin, bring in part-time practitioners, or add a marketing assistant. It'll give you space to focus on your unique contribution.
- **Amplify What's Already Working:** If you've found a lead magnet or offer that reliably converts, make the investment in paid ads or expanded reach. But only after you optimize your conversion and onboarding flows. Otherwise, you're just scaling chaos.

Do not scale until you've established a solid foundation. If you haven't addressed clarity, attraction, conversion, and retention, you're better off tightening those up before piling on more. Scaling chaos just leads to greater instability.

At Salt Marketing, we created a simple readiness checklist:

- Messaging clear → You know exactly who you serve and how.
- Systems automated → Lead-to-client path is predictable.
- Metrics reliable → You track conversions, retention, cost.
- Profit model stable → You know your LTV, CPA, margins.

This is the fun part: using your numbers to guide your growth, instead of letting growth chase you. You're moving from being busy to being strategic, from reactive to proactive, from good to scaled. And while you scale, you maintain the integrity, care, and connection that defined your practice from the start.

## **Building For Long-Term Success**

You've shown up, done the work and built a marketing machine that attracts, converts and retains clients. You've refined your strategy, learned how to scale smartly, and set the foundation for meaningful growth. Con-

gratulations! This is just the beginning. Because success means growth in alignment with your vision, your passion, and the life you want to create.

Let's zoom out for a moment. You're not just building a wellness practice — you're designing a business that grows *with* you. A business that evolves, remains relevant, and creates the freedom, impact and fulfillment you first imagined when you started this journey. In this final stretch we'll help you design that longer-term future — while still keeping it exciting, doable and true to you.

What does your ideal future look like? Picture it: the clients you serve, the hours you work, the team you gather, the impact you make. Maybe you envision a boutique practice where you work intimately with a few high-value clients, or perhaps a robust centre with a team and memberships and a mix of digital and in-person services. There is no one right answer — there's only the right answer for *you*.

After all, your business should serve your life — not the other way round. What does your perfect week look like? If money were no object, what would you add? What would your workweek feel like?

Monday morning check-in followed by afternoon clients, Tuesday client sessions, Wednesday clients in the morning, content creation in the afternoon, Thursday self-care or learning, Friday established clients or team development.

Map it out. Once you see it, protect it. Automate what drains you, delegate what someone else should do, and reserve your unique time for where you offer the most significant value.

Building long-term success is a dynamic process. You'll schedule a Monthly Marketing Check-In to review your metrics (yes, you'll come back to those!) and ask: What worked? What didn't? What do we stop, keep, or start next?

Then you'll experiment and adapt — try new offers, new referral strategies, new digital formats. Don't be afraid. Each test, even if it doesn't immedi-

ately win, gives you clarity. And above all, stay curious. The wellness world and the marketing world both change. The brands and practices that thrive constantly evolve and adapt.

When you think of the Salted Edge Framework — from attract → convert → retain → automate → measure & scale — this final step weaves them all together into something enduring.

You're building a practice that scales and *sustains*. Yes, you're creating a legacy of impact, but also a business that supports your life, health, freedom. You've done the work and laid the foundation.

Now step into the future you've imagined confidently, intentionally, and joyfully.



## **Chapter 8 Salt Shaker: Let Your Numbers Guide You; Not Terrify You**

Take a deep breath and remember that your numbers are a guide, not a judgment. This month, choose one simple rhythm:

- Set a 30-minute Monthly Marketing Check-In on your calendar.
- Pick one north-star metric (like new-client revenue or lifetime value).
- Track three supporting numbers that reveal whether you're moving closer or drifting off course.

Then ask three powerful questions:

- What's working that I should do more of?
- What's draining time or money that I should stop?

- What's one smart adjustment I'm ready to start?

Data sharpens your intuition. It helps you scale with intention instead of hustle, and clarity instead of chaos. When you measure what matters, you give yourself permission to grow without burnout, expand without losing your values, and build a practice that truly supports your life.

Measure wisely. Scale intentionally.

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# Part III

Applying The Scalable Simplicity System™ to Your Practice

**(Guided implementation and real-world examples)**

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# Chapter Nine

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## Taking Action

### Your 90-Day Growth Plan

Parts One and Two gave you clarity, confidence, and a new outlook on marketing. In Part Three, you'll gain powerful momentum by turning insights into action, and action into results.

During the next 90 days we're going to create traction in your marketing that will lead to peace and eliminate the hustle. Say goodbye to promoting discounts to match or beat the competition, posting at random because you think you should, or chasing every new idea that crosses your feed. Part Three involves focused, intentional progress that compounds quietly at first, then suddenly feels undeniable.

Whether you're a med spa owner balancing patient care, providers, and operations, or a wellness practice CEO who feels like marketing always ends up on the bottom of the list, I wrote this chapter with you in mind. I designed it to help you take what you've already learned and put it into motion — without unnecessary complexity or a blown-up calendar.

Before we go any further, I want to emphasize one critical point: this 90-day plan works because it's built on the framework you've already learned. If you skipped ahead to this chapter, hoping for a checklist that magically fixes your marketing, consider this your gentle pause button. The actions in this chapter assume you've already done the foundational work by refining your message, identifying your ideal client, understand-

ing how your marketing supports their journey, and transitioning from a hustle mindset to a systems mindset.

If any of that still feels fuzzy, it's a sign that tightening your marketing foundation will make everything that follows easier and far more effective. Go back, revisit what you need, and then come right back here.

Because when you execute this plan correctly, the next 90 days will move your marketing forward and change how it feels to run your business.

## **Think Like a Wellness CEO**

Before we talk about the action steps, let's spend a minute talking about how you think.

This is where I see many smart, capable wellness entrepreneurs unintentionally getting stuck. They care about growth, yet they approach marketing like a task to survive instead of a system to lead.

Over the next 90 days, you're no longer "trying marketing." You're building a literal business asset, not a concept that lives solely in your head or depends entirely on your energy.

When it comes time for you to "exit the line" and let others run things for you — or even sell the business, that's the moment you'll recognize that your simple, repeatable marketing system that consistently generates new business is a true asset, not another task that requires your day-to-day involvement. That's what I mean when I urge you to think like a CEO and build marketing systems that others can eventually run without you.

As a wellness CEO, marketing becomes a strategic responsibility you guide, instead of a burden you carry alone. It becomes an activity that subtly and independently works in the background of your business to support growth, create opportunity, and open doors.

This mindset shift matters because progress results from doing the right things consistently, with intention. Remember, more posts don't equal

more patients. More platforms don't equal more revenue. Clarity, authenticity, consistency, and follow-through connect with the people who will benefit most from what you have to offer.

Your role in the next 90 days is to decide what matters, protect the strategy, and simplify wherever possible to increase revenue. That's the real CEO work that facilitates growth without chaos and amplifies your impact exponentially.

## **What the Next 90 Days Will Look and Feel Like**

Think of the next three months as a thoughtful reset and rebuild of your marketing that finally brings everything into alignment. Over these 90 days, you'll move through three distinct but connected phases: Get Found. Get Booked. Amplify Your Impact. Each phase builds on the previous one, creating grounded, sustainable, and most importantly, effective momentum.

The first phase, *Get Found*, focuses on bringing your message into sharp focus so it can begin to do the heavy lifting for you. You'll make it easier for the right people to recognize themselves in what you say whether they discover you through search, social media, email, or a referral. It's about being clearer and more intentional, so when someone encounters your practice, they immediately understand who you help and why you're different.

Next comes *Get Booked*, where clarity turns into action. With your messaging and website aligned, you'll guide interested prospects toward a confident next step. Your website now functions as a true conversion tool that invites people to book and removes hesitation. You'll put simple systems in place to capture interest, follow up thoughtfully, and make booking feel natural and easy.

Finally, you'll move into *Amplify Your Impact*. This is where everything you've built begins to work together. Automation replaces manual effort. Momentum replaces guesswork. You're no longer wondering what to do

next because your marketing has a rhythm that supports your growth *and* sanity. You'll refine and amplify what's working to allow your reach, results, and revenue to grow without demanding more of your time.

Throughout these 90 days, focus will be your greatest asset. There may be moments when you wonder if you should be doing more by experimenting with every new idea that pops into your head. That's normal. However, this is where leadership matters. You must block out the noise and commit to simple, repeatable systems that allow real results to take hold.

As this plan unfolds, you'll begin to notice a subtle but powerful shift. Conversations with prospects feel easier. Decisions about marketing feel less ambiguous. The constant mental loop of "What should I be doing next?" recedes, replaced by confidence in a strategy you understand and trust.

And most importantly, you'll start seeing the results you've been working toward all along. New patients will find you. New clients book appointments. Your audience engages more deeply. Revenue increases because your marketing is finally doing its job.

That's where we're headed.

In the pages that follow, I'll walk you through exactly how to move through these next 90 days step by step to build momentum with confidence, clarity, and purpose, and finally experience the exhilaration of marketing that works *with* your business, not against it.

Get out your calendar and let's make a plan.

## **Your 90-Day Plan**

### **Days 1-30: Get Found**

*Clarity That Attracts the Right People*

Month One sets the stage for everything that follows.

Before more people can book appointments, automation can work its magic, and momentum can build, the *right* people must be able to find you — and recognize themselves immediately when they do.

By the end of these first 30 days, you will have accomplished a significant milestone: you will have developed the clarity and infrastructure that allow the *right* people to find you and take the first step with confidence.

Your clear message will make your audience feel understood. And your marketing will finally feel like it's working in alignment with you. That's what "Get Found" really means.

During these first 30 days, you're not pushing content harder or attempting to expand your reach yet. You're refining how you talk about what you do, who you help, and why it matters, so that when someone encounters your practice, they feel seen, understood, and guided toward the next step.

Think of Month One as the month where you stop blending in and start standing out in a natural, authentic manner, aligned with the care you provide. The work you do here will quietly power everything else in the next 60 days.

Most practices can complete this month's work in a few focused hours each week. You don't need huge blocks of uninterrupted time: just intention, follow-through, and a willingness to simplify.

### **Week One: Differentiate With Simple Messaging**

Back in Chapter Three, I introduced you to the StoryBrand one-liner — a simple, powerful sentence that positions your client as the hero and you as their guide. We talked about the urgency of having a clear message that instantly communicates what you do and how you help.

Now it's time to bring that concept to life.

Your one-liner becomes the foundation of how people find you. It shapes your website headline, informs your content, strengthens referrals, and

gives your audience a clear reason to lean in. When you do this well, marketing becomes easier because you're no longer trying to explain everything all at once.

Plan to spend about 60 to 90 minutes on this step. That's it.

Start by grounding yourself in four key elements: who you help, the problem they're facing, the solution you provide, and the result they want.

Once again, focus on clarity. As you write, imagine someone landing on your website or hearing about you for the first time. They should immediately think, "*That's me.*"

Here is a simple formula to follow: "We help [ideal clients] who struggle with [problem] by providing [solution], so they can [result]."

For example, a med spa might say:

"We help women who are feeling less confident than they used to by offering scientifically backed treatments, so they can reach their goals and feel comfortable in their own skin again."

A physical therapist might say:

"We help active adults dealing with pain that limits their movement by providing personalized physical therapy, so they can get back to the activities they love."

Don't worry about perfection. This is a working statement, not a tagline carved in stone. You'll refine it over time, but you need a clear starting point now.

If you find yourself stuck, flip back to Chapter Three for a refresher. When your one-liner feels honest, specific, and client-centered, you're ready to move on.

## Week Two: Mapping the Customer Journey

Once your message is clear, the next question becomes: *How does someone actually move from discovering you to trusting you?* This is where your Customer Journey Map comes in. It's time to step into your client's shoes.

The Customer Journey Map is one of the most important exercises you'll complete in this book because it forces a subtle (and powerful) shift in perspective. Instead of asking, "*What do I want to promote?*" you ask, "*What does my client need right now to keep moving forward?*"

That distinction changes everything.

This exercise elicits a better understanding of the *primary path* your ideal client takes — from first awareness to becoming a loyal advocate — to help your marketing support them instead of "sell" them.

As you complete your worksheet, keep your one-liner and core messaging nearby to act as your compass. If something doesn't align with the problem you solve or the outcome you promise, it probably doesn't belong here. This step, best completed in one setting, if possible, typically takes 60 to 90 minutes.

As you work through the journey, you'll naturally sharpen your understanding of your Ideal Client Profile. You'll start to see patterns in the form of common pain points, emotional drivers, and decision-making triggers. Once you gain this recognition, you'll create messaging that meets them where they are, instead of talking past them.

Let's walk through the process of mapping the five stages of your customer's journey together (we'll get into a deeper explanation of each in a moment): starting with awareness, moving to consideration, and the all-important stage of conversion, then loyalty, and finally, advocacy, when your clients do your best marketing.

For each of the five stages, we're going to consider the following:

- **Action** - What is the client doing, and where?
- **Touchpoints** - What part of our offering do they interact with?
- **Thoughts & Feelings** - What is the client thinking & feeling in that stage?
- **Opportunity** - What are we doing to move them to the next phase?

By the end of this step, you should feel more grounded. Instead of guessing what to say or share, you'll have a clear sense of what your audience needs at each stage and how your practice guides them forward.

### CUSTOMER JOURNEY MAP

	Awareness	Consideration	Conversion	Loyalty	Advocacy
<b>ACTIONS</b> What is the client doing, and where?	Follows, seeks out additional information online or in person	Comes in for an event, books a consultation, appointment online or via phone	Pays for services	Submits a review, becomes a repeat client	Refers others, promotes an event
<b>TOUCHPOINT</b> What part of our offering do they interact with?	Social media, email list, website	Website, front desk and providers	Providers, front desk	Third party online tools, providers, front desk	Front desk, public, potential clients
<b>THOUGHTS</b> What is the client thinking?	Could they help me become confident?	I think this is the solution I'm looking for	I'm glad I have a plan to solve what bothers me	I'm so ready to see the results of my individualized plan	I love this business & everyone I know desires to know about it
	How could this go wrong? Can I trust them?	Is this the best provider? Should I research and compare others?	This is too expensive, I don't need to do this.	Not sure this substantial investment is worth it.	Will they let me down if I recommend them to others?
<b>FEELING</b> What is the client feeling?	Curiosity - could this be the solution I'm looking for?	Optimism - this could work for me!	Eager - I can't wait to see my results, I hope others will notice too	Confident and knowledgeable - I've overcome what was holding me back	Generous and happy - I need to share the success I've had so others can have it too!
<b>OPPORTUNITY</b> What are we doing to move them to the next phase?	Offering incentives, interest-specific opportunities to attend an event or book a consultation	Providing additional education via email, social, personal interaction	Following up with procedure-specific information via email, text, reminders for next appointment	Incentivizing referrals with rewards for loyalty, communicating well and often	Creating exclusive offerings to reward our most loyal customers (events, giveaways, etc.)

## Your Customer's Journey Stage One: Awareness

Stage One, Awareness, is when your client becomes aware of a problem, but not necessarily *you*. They might be thinking, “*Something isn't right and I'm starting to notice it,*” but they may not be searching for your specific solution yet. They're simply noticing symptoms, frustrations, or changes, and wondering if there's a solution.

As you fill in these boxes, assume the role of the guide and view your client as the hero of their own story. Jot down a brief answer to:

- **Action:** What is happening in my potential client's life that makes them start paying attention?
- **Touchpoints:** Where are you interacting with them as they come to this realization?
- **Thoughts:** What questions are forming in their mind?
- **Feeling:** What emotions are they expressing: curiosity, concern, frustration, hope?
- **Opportunity:** Does our messaging speak to *this* moment?

Recognize that at the Awareness stage, your opportunity is to reassure and educate. You're helping them recognize that what they're experiencing is real, common, and solvable.

## Your Customer's Journey Stage Two: Consideration

At this stage, your client knows they have a problem and they are actively looking for options. They might articulate it by saying, “*I think this could help, but I want to be sure.*”

The actions they take could include visiting your website, consuming your educational content (such as videos or blog posts), or following you on social media to see if you're the resource they're looking for. Additional

actions might include asking colleagues, friends, or trusted neighbors for recommendations.

You develop or lose trust in the Consideration Stage. If you don't build trust at this point in their journey, they may very well look elsewhere and not return.

As you map the Consideration stage, think about:

- **Action:** What resources are my potential clients accessing?
- **Touchpoints:** What questions are they trying to answer right now by interacting with us?
- **Thoughts:** What comparisons are they making?
- **Feelings:** What doubts or hesitations are creeping in?
- **Opportunity:** What would help them feel confident choosing *us*? What can we do to move them to the Conversion stage?

This is where your customer journey and messaging must work together. Your content, website, and communication should reinforce your role as the calm, wise, and trustworthy guide. At this point, your opportunity is to reduce friction and increase confidence through education, clarity, and empathy.

### **Your Customer's Journey Stage Three: Conversion**

Conversion starts when they decide to book. At this point, you're right in front of them and they affirm, *"I'm ready to take the next step."*

Although your potential client is ready to act at this stage, they still need reassurance that they're making the right choice. Even small barriers like confusing booking processes, muddled next steps, or unanswered questions can cause hesitation.

As you map out the Conversion step, ask:

- **Action:** What does my potential client do to move forward? Call? Book online? What do we want them to do?
- **Touchpoint:** Is there friction in the process? How easy is it for them to book, call, or inquire?
- **Thoughts:** What hesitation might keep them from moving forward?
- **Feelings:** What fears might still be present (cost, results, commitment)?
- **Opportunity:** How can we make taking the next step feel natural and supportive?

This is where explicit calls-to-action, thoughtful follow-up, and confident language matter most. Jot down how you'll move them from mere conversion to loyal client.

### Your Customer's Journey Stage Four: Loyalty

Yes, you develop loyalty after the sale, but it's influenced by everything that came before it. At this stage, your client is experiencing your care, your process, and your communication. They're evaluating whether the investment was worth it financially and emotionally. You want them to think, *"I'm so glad I did this."*

As you think through the Loyalty Stage, ask:

- **Feeling:** How does my client feel after starting services?
- **Touchpoint:** What reassurance or communication helps them stay engaged?
- **Thoughts:** What signals tell them they're on the right path?

- **Feelings:** How do we continue to guide and support them to get results and inspire confidence?
- **Opportunity:** How can we reinforce the transformation we promised and deepen the relationship?

You respond to opportunities in this stage via thoughtful communication and consistent follow-up. It moves your clients and patients from loyalty to willingness to talk about what you do with others, making them your greatest source of new business.

### **Your Customer's Journey Stage Five: Advocacy**

Advocacy happens because you gave them a meaningful experience. At this final stage, your client is confident, satisfied, and eager to share. They may leave a review, refer a friend, or talk about your practice publicly. They're thinking, "*Others need to know about this.*" Remember in Chapter 6, when we talked about the RAVE system and being able to Recognize, Ask, Value, and Elevate with every client or patient? The Advocacy stage of your Customer Journey map will help you understand thoroughly how this works in the mind of your client or patient, which makes the process feel like a natural progression.

As you define this moment, consider:

- **Actions:** What would make my client proud to recommend us?
- **Touchpoint:** How do we invite referrals or reviews in a way that feels natural? Online? In person? Via email?
- **Feeling:** What emotions are my clients expressing, e.g., gratitude, excitement, generosity?
- **Opportunity:** How can we make sharing easy and appreciated, without pressure?

## A Final Reminder as You Complete This Exercise

Your Customer Journey Map focuses on your *people*. Resist the urge to complete this form from your perspective as a provider. Instead, continually ask:

“What does my client need to see, hear, or feel at this stage to move forward with confidence?”

When your messaging, marketing, and systems align with the customer journey, being “found” no longer feels like a mystery and growth becomes something you can intentionally support.

Once you complete this map, you’re ready to move forward with precision, knowing exactly how your marketing should guide your ideal clients from first awareness to confident action. Below is an image of a completed map, followed by a blank map you can fill it for your unique customer journey.



*Scan this QR code to download & print your fillable Customer Journey Map*

## Week Three: Create and Launch Your List Builder

Not everyone who finds your practice is ready to book an appointment right away.

It’s not a failure of your marketing, it’s simply how people make decisions, especially pertaining to their health, confidence, or long-term wellbeing. Most people need time to learn, understand their options, and feel confident that they’re making the right choice.

A list builder, also known as a lead magnet, exists for exactly this reason. It gives people a way to raise their hand and say, “*I’m interested, but I’m not quite ready yet.*” And it gives you a way to stay connected, helpful, and relevant instead of hoping they remember you weeks — or months — later.

If you’ve ever had people visit your website, read your content, and then disappear, this step quickly solves that problem.

### **What Is a List Builder and Why Does It Matter?**

A list builder is something valuable you offer in exchange for an email address. That’s all. It’s not a sales pitch, and it’s definitely not a list of your services. It can be a mini course but it shouldn’t take someone more than about 15 minutes to gain its value because it’s not meant to explain everything you do.

Think of it as an invitation rather than an ask. You’re offering guidance around a specific problem your ideal client already cares about, and in return, they’re giving you powerful permission to continue the conversation. It turns a one-time visitor into a relationship, and relationships lead to bookings.

### **Do I Actually Need a List Builder?**

Only if you want visitors to your website to *convert* to new clients and patients. Most new visitors are interested but cautious. They’re gathering information, comparing options, or simply trying to understand what’s going on with their body or health. A list builder allows them to take a small, safe step forward without pressure.

For med spas and wellness practices, where trust and education significantly influence decision-making, a list builder is not optional, but necessary. It meets people where they are instead of forcing them to decide before they’re ready.

## Choosing the Right Topic: Let the Problem Lead

The best list builders offer relevance; they're not cute, clever or designed to be click-bait. How do you select the right topic? Go back to your one-liner and customer journey map. Ask yourself what worries or confuses your ideal client *before* they ever book an appointment. What answers to what questions are they searching for late at night? What uncertainty might be holding them back?

Your list builder should address one clear problem and offer education, reassurance, or next steps. It should feel like something you'd naturally explain to a patient during an initial conversation.

Here's the simplest way to sanity-check your idea:

- Does this help my ideal client understand their problem better?
- Does it align with the solution I ultimately provide?
- Does it naturally lead toward booking when they're ready?

If the answer is yes, you're on the right track.

## What Your List Builder Must and Must Not Do

Your list builder has a singularly focused job: to build trust and nurture the relationship. Therefore, you must intentionally design it to help your ideal client (someone who will truly benefit from what you do) feel informed, understood, and supported. You should use it to reinforce your role as their trustworthy guide and make the next step feel natural, whether it's reading more, replying to an email, or eventually booking.

It does not need to replace a consultation or explain every service you offer, nor does it need to be long, polished, or perfect. If you find yourself thinking, "*This feels too simple,*" that's often a sign you're doing it right!

## **Choosing an Easy Format**

For most practices, a short PDF guide or checklist is the easiest place to start. It's familiar, flexible, and quick to produce. Of course, you can also offer access to gated video content, where someone enters their email address to watch a short video or series. Some practices choose interactive options like quizzes or calculators, which can work beautifully, though they're not a requirement.

There is no "best" format; there's only what feels doable right now. You're not locking yourself into a forever decision but creating a starting point. The best format is the one you'll actually create, and your prospects will actually consume.

## **How to Create a List Builder Without Overthinking**

Plan to spend about two to three hours on this step.

Start by outlining what you'd want a client or patient to understand if they asked you about this problem in person. Write in a conversational, reassuring tone, just as you would in your office. Focus on clearness, not completeness. Don't feel like writing? Open up a voice app and free form dictate it. It's okay if it's messy, out of order, or feels a little awkward at first.

Many practices create their first list builder using tools to which they already have access, and that's more than enough. After you feel like you have the basics written down, use your favorite AI tool (e.g., Chat GPT, Claude, Perplexity, Gemini, etc.) to help you structure the content and make it cohesive. Provide it with your brand message and context for what you're writing by explaining how it aligns with the overall customer journey. Once you pour all of your thoughts into it, watch it draft something useful and valuable. Of course, you can always refine and revise the results, but AI can move you close to a finished product in just a few minutes.

Once you have written the content, keep the design clean and simple. The goal is to provide helpfulness to your ideal client, not to wow them with

your design skills. Your list builder can take the form of a straightforward Google Doc, branded with your logo and colors. You can use Canva to create something more advanced or even hire a designer on platforms like 99 Designs, Fiverr or Upwork to create a sophisticated, branded document you're proud to share.

Finally, connect it to your website to allow your visitors to easily access it, and you to capture their email address when they do. You can set up an opt-in form and email the link or PDF automatically when someone requests it. Through frictionless automation, you'll embark on a beautiful relationship.

### **Why Is a List Builder a Critical Component of Marketing?**

Your list builder does quiet, behind-the-scenes work, supporting the people who are not yet ready to buy. It prevents lost opportunities and builds trust in you, and your expertise and results over time. Most critically, when someone *is* ready to book, it keeps your practice top of mind because you've continued to show up with value instead of disappearing.

Once your list builder is live, you're ready for the final step of Month One: setting up a simple, automated follow-up to make every new connection feel guided, welcomed, and supported from the very beginning.

### **Week Four: Set Up Basic Automated Follow-Up**

The final step of Month One makes everything feel more professional and supportive. Up until now, you've focused on clarity. You've refined your message, mapped your client's journey, and created a list builder that gives people a meaningful way to raise their hand. Now it's time to make sure no one is left wondering what happens next.

When someone downloads your guide, completes your quiz, or requests access to gated content, something should happen automatically to prevent them from feeling as if they've dropped into a void, and make them feel acknowledged, supported, and gently guided forward.

That's the role of automated follow-up.

### **What Does Automation Really Do?**

At its core, automation continues the conversation thoughtfully and humanistically, without requiring you to remember who downloaded what, and when.

You'll set up a short welcome sequence of five messages, delivered every three to five days. These messages can include email and text, depending on what feels appropriate for your audience and practice. Pacing matters because too fast feels pushy, and too slow feels disconnected. The right rhythm keeps you present without overwhelming the person on the other side.

Once someone books an appointment, they should automatically be removed from this sequence and added to your regular email newsletter or client communication flow. That way, your messaging stays relevant to where they are in their journey. Set aside two to three focused hours for this step. Remember, it doesn't have to be overcomplicated; keep it simple and clear.

### **Simplifying the Required Technology to Prevent Overwhelm**

With multiple tools available that allow you to connect your list builder to your CRM and trigger automated follow-up, it's easy to feel overwhelmed. However, you do not have to evaluate every option or master every feature. You just want to choose a system that can do three basic things well: capture an email (and possibly a phone number) from an opt-in form on your website, send automated emails and texts, and move people out of the sequence once they book.

Once you connect your website to your CRM, you're in good shape. The technology is simply the delivery vehicle for the message, which is where the real value lives.

## **Let Your Brand Messaging Do the Heavy Lifting**

One reason this automation does not have to be complicated is because you've already done the deep work. Your one-liner, customer journey map, and brand story contain everything you need to create an automated nurture sequence that converts. You're not inventing new ideas; you're reinforcing the same promise from different angles.

This is also where AI can be incredibly helpful. By providing your preferred AI tool with your list builder content, one-liner, positioning, and a brief explanation of who you serve, you can generate strong first drafts that sound aligned and intentional. AI does not replace your voice; it accelerates the process so you're not staring at a blank page. From there, take the time to tweak and refine. Read each message out loud. Ask yourself if it sounds like something you'd actually say to a patient or client. The purpose of this sequence is not simply to move someone toward booking but to develop trust and establish the tone for the relationship you want to experience long-term. Keep in mind that that trust directly impacts client lifetime value.

### **How the Five-Part Welcome Sequence Works**

The first message always follows up on what the person requested. If they downloaded a guide, acknowledge it. If they completed a quiz, reference it. Deliver value immediately and reassure them they're in the right place. This message sets the tone: helpful, calm, and client focused. Don't pressure them to book just yet but provide a link or click to call to give them that option if they're ready. This first communication celebrates the small win of having taken the first step.

The second message gently revisits the problem they're experiencing and introduces your practice as the guide with the best solution to solve it. You're not pushing an appointment yet; you're connecting the dots by reminding them why it matters to them and showing them a clear path forward. Now it's the perfect time to encourage them to book and get started! Provide a direct booking link.

The third message is about proof. This is where you tell a story or share a testimonial that demonstrates what's possible. Don't just list your services, illustrate *transformation* and cast a vision for success. You're helping your prospective client or patient imagine themselves on the other side of their challenge. Again, provide a link to book as well as a link to see more client success stories, which may live on your website or your Google Business Profile.

The fourth message addresses the questions and hesitations you hear all the time. Cost, time, uncertainty, fear of results — whatever objections commonly slow people down. When you address these openly and honestly, you remove friction and build credibility. Encourage them to move to booking a consultation to have their own questions answered!

The fifth message creates a gentle but confident shift in perspective. This is where you help them see the situation differently. You might acknowledge how they used to think about the problem, then invite them to consider a new way forward. This message clearly asks them to book, tying together everything you've shared so far.

It's important to keep in mind that you're not waiting until the final message to invite action. Each touchpoint can include a soft reminder that booking is available. The final message simply brings that invitation into focus, with a special offer or incentive or a compelling reason to book.

### **Why Setting Up Your Automated Nurture Matters More Than It Seems**

With the strategic use of automation, every person who engages with your practice feels seen and supported, even when you're busy running your business. It creates consistency, builds trust, and honors the client journey. Most importantly, it allows your marketing to work in the background, supporting growth without demanding more of your time.

You've now set up Month One: Get Booked in full. You've created clarity, built a foundation for connection, and put systems in motion that allow the right people to find you, and take the next step when they're ready.

Next, we'll move into Month Two: Get Booked, where we transform that trust and momentum into confident action.

## **Days 31-60: Get Booked**

### **Week Five: Optimize Your Website for Conversion**

Week Five has one combined goal: fix the bottlenecks and make it easier for the right person to book online. Not “improve your website.” Not “refresh your brand.” Not “tweak a few things.” You’re doing focused conversion optimization by removing confusion, reducing hesitation, and making the next step obvious.

Think of it like walking through your practice with a first-time patient. If the signage is unclear, the forms are clunky, or no one greets them, they don’t feel confident moving forward. Your website works the same way. Plan to spend about three to five total hours this week. If you can carve out two focused blocks (90 minutes each) plus a few smaller sessions, you can make meaningful changes quickly.

#### **Step One: Do the “First-Time Visitor Walkthrough”**

Open your website on your phone first since that’s where most people will view it. Then open it on the desktop. Now, pretend you know nothing about your practice. You’re someone with a real problem who is curious but cautious. As you click around, pay attention to where you feel any friction.

Ideally, if you know anyone who is unfamiliar with your business, you can ask them to do this with you watching over their shoulder. But in the absence of that scenario, step into the shoes of your prospect: can you understand if this is for you, and what outcomes you can expect? Is the next step obvious *and repeated* or do I have to hunt for it? Do you feel guided, or like you’re reading a confusing menu with too many choices?

As you go, jot down the moments where you feel:

- Confused (“What am I supposed to do here?”)
- Overwhelmed (“Too many options.”)
- Uncertain (“Do I trust this?”)
- Stuck (“How do I actually book?”)

## **Step Two: Fix Above-the-Fold Clarity**

“Above the fold” is what someone sees before scrolling. It’s the most valuable real estate on your website because it determines whether they stay or bounce. Your job is to make sure the top of your home page passes the StoryBrand “grunt test” quickly. Does your website:

1. Clearly communicate what you offer?
2. Explain the outcomes you help people achieve?
3. Tell them how to get it?

You’re not rewriting your entire home page but improving the *first impression*. If your home page currently leads with “Welcome to...” or a list of services, it will often kill conversion. Replace that generic messaging with inspirational, outcomes-based language.

## **Step Three: Simplify Navigation and Make Booking Impossible to Miss**

If you’ve done your job well in Month One: clear messaging, a robust customer journey, a lead magnet that speaks to your ideal clients and automated follow-up, you won’t have a “traffic problem.” You’re blogging, posting on social media, sending out emails, all designed to drive visitors to your website. If you have the traffic, why aren’t people booking? The answer is usually a “too many choices” problem.

You can overcome that with clear and logical navigation, with prominent booking buttons placed strategically and a mobile-friendly design. In this

step of your website optimization, your job is to simplify the path to booking by:

- Reducing menu clutter with a hierarchy, because not everything belongs in the top level
- Grouping services into logical, outcomes-based categories or “solutions” (more on that in a minute)
- Making the most important pages easy to find
- Placing direct booking buttons in obvious, repeated locations

If you do nothing else this week, do this one thing: Make “Book Now” (Or Schedule Now, or whatever phrase works well for your practice) visible in the top right of your header and repeat it as appropriate throughout key pages, especially on mobile.

#### **Step Four: Upgrade Service Pages from “Menu” to “Solutions”**

Prospects often decide while on Service pages, yet many service pages read like a brochure: what the treatment is, what it includes, how long it takes, and how much it costs. Although this information matters, it does not compel bookings. Save the details and the science for a blog post — and link to it from your Solutions pages.

Don’t get me wrong, you need your Services pages for SEO and for prospects who know what they want and are ready to book. But for positioning your practice and driving traffic, you want to create detailed pages that start with the outcome. These Solutions pages should validate the problem to make your prospect feel understood and explain your approach in a few simple steps. Follow that up with social proof in the form of testimonials, before-and-after photos, or even your credentials. Repeat the booking call to action throughout.

It’s not necessary to rewrite every Service page this week. Pick the top one to three revenue-driving services and optimize those first.

### **Step Five: Reduce Booking Friction and Add “Conversion Helpers”**

Let’s talk about conversion helpers that facilitate the biggest wins quickly. Identify ways to make it easy to book. Can you add a click to call button on mobile? Is your contact information easy to find (we recommend always placing it in the footer). Can you add two-way chat or texting support?

In short, if someone is ready to book right now, can they do it in under 30 seconds? From your socials, your website, on their phone or their laptop? Can they DM you? Text you? Reduce any friction in the process and honor that customer journey to consistently move prospects to the next step.

### **Step Six: BONUS —Trust Signals**

Finally, remember that trust is a conversion tool that builds relationships and long-term loyalty. Trust signals displayed on your website, posted on social media, and shared via email newsletters can all help move your prospects toward booking.

Trust signals include:

- Reviews/testimonials near calls-to-action
- Certifications, credentials, associations
- Before/after gallery (even a small one)
- “What it’s like to work with us” in your About section

Put trust signals where decisions happen: near booking buttons, pricing, “what’s included,” and the first step offer.

## Week Six: Get Bookings Based on Results

As my good friend Jessica Miller likes to say on her podcast, "It's Your Offer!"<sup>1</sup>, this week we're taking action to ignite a powerful shift in how patients and clients experience your practice. What you're about to see is that most med spas and wellness practices discount services when they want to bring in new business. When your competitors reduce prices, it looks like "\$11 per unit of Botox" or BOGO sessions. Don't be tempted to price match. From here forward, your clients are investing in *outcomes*.

They don't want a facial, a scan, or a session. They want to feel confident, move without pain, recover faster, age well, or finally see results that last. When your marketing and conversations focus on services and prices, you ask prospects to connect the dots themselves. When you focus on outcomes, you guide them clearly and confidently toward a decision. That's what framing your offers based on results is all about.

### Step One: Identify the Outcomes You Deliver

Set aside about 60 minutes for this first step. Start by looking at your most common services and asking a different question than you normally would. Instead of asking, "*What do we offer?*" ask, "*What changes for someone after working with us?*"

Think in terms of:

- How someone feels
- What they can do again
- What problem is no longer dominating their life
- What result they're proud of

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1. *It's Your Offer* Podcast – Jessica Miller – <https://podcasts.apple.com/us/podcast/its-your-of-fer/id1550839588>

You'll often find that several services contribute to one larger outcome. That's a clue that you're not selling individual services but delivering a result. This recognition becomes the foundation for everything else you do this week.

### **Step Two: Reframe Services into Result-Based Packages**

Now, you want to organize and reframe your services into clear, outcome-driven packages. A result-based package will group your individual services together around a goal, not a price point. Instead of listing treatments à la carte, you present a guided path that helps someone reach a specific outcome.

This process accomplishes three important things:

- It simplifies decision-making for the client
- It positions you as the expert guide (with the results to prove it)
- It increases trust by setting clear expectations

It might sound like you're removing choice when you're really removing confusion and overwhelm. At this stage, you don't need to finalize names, pricing, or long descriptions. You're simply organizing your offerings around *results achieved*, not *services performed*.

### **Step Three: Update Your Website**

Now it's time to make this visible. Take a little time to update a few critical areas of your website so visitors immediately understand what they can achieve by working with you.

Focus on:

- Service pages that lead with outcomes before listing services
- Headings and subheadings that describe results, not procedures
- Booking pages that reference goals and transformations

To be clear, you're not hiding your services, the science, or your expertise, just reframing them as required tools to reach a destination. This approach makes booking feel purpose-driven instead of transactional.

#### **Step Four: Incorporate Outcome-Based Language into Consults**

Your website sets expectations, but your consults reinforce them. This week, take time to review the structure of your current consultations and identify where you can shift the conversation from *what you do* to *what they can achieve*.

This process may include:

- Opening consults by confirming the outcome the client wants
- Explaining recommendations as a pathway toward that result
- Referring back to the outcome throughout the conversation

When you frame consults this way, pricing discussions feel more natural because the focus remains on value and results, not line items. When you sell a package or a membership, the client or patient perceives it's in service to their own goals, rather than your bottom line.

#### **Step Five: Train Your Front Desk to Speak in Outcomes**

Finally, bring your front desk team into alignment because your staff is often your prospect's first human interaction. When you teach your team to speak confidently about results instead of rattling off services, it reinforces all of your marketing efforts.

Making this shift doesn't require a long training session. It can be as simple as:

- Sharing your one-liner and brand message
- Explaining how to describe packages in plain language by providing your team with outcomes-based framing that will immediately

come to mind when a patient or prospect begins asking questions.

- Practicing a few common conversations together

When everyone uses the same language to explain the outcomes you achieve, the experience becomes cohesive and professional, instilling the confidence clients or patients need to take the next step.

### **Why This Week Matters So Much**

When you sell outcomes instead of services, you reduce hesitation and increase clarity at every stage of the journey. Prospects understand that they are the hero of their own journey, working toward a particular outcome. Your consults assume a more collaborative tone, facilitating easier pricing discussions because you can naturally justify your pricing based on the value you're demonstrating.

Most importantly, you stop asking people to “buy a service” and start inviting them to achieve a result. That shift alone can dramatically increase bookings, reduce the number of promotions or discounts you offer, and set the stage for everything we'll expand upon in the next two weeks.

## **Week Seven: Turn Interest into Action – Converting Leads into Paying Clients**

In Weeks 5 and 6, you optimized your website and created outcome-based packages. Now that you have generated interest in your prospective clients or patients, it's time to convert that interest into actual bookings. The focus is on concrete actions that turn leads into consults, and consults into paying clients or patients, right now. By the end of this week, you should see real movement: more scheduled consults and more clients and patients committing to treatments.

### **Step One: Respond to New Leads Within Minutes**

Speed matters tremendously in lead conversion. If a potential client calls, emails, or fills out a form, responding immediately (ideally in under five

minutes) can be the difference between booking them or losing them. Studies show businesses that follow up with leads in five minutes or less are 100× more likely to connect and convert them, whereas waiting more than 10 minutes leads to a drastic drop in conversion. Don't let your hot leads cool off!

- **Make Instant Response a Rule:** While your automations prevent leads from falling through the cracks, you also want to train your team to prioritize lead responses above everything. When a new inquiry comes in, stop and respond *as soon as possible*. A quick phone call or even a text/email saying, “Got your request – calling you now!” shows the prospect you value their time and understand their needs.
- **Use Templates & Alerts:** Prepare a few quick-response templates or scripts so you're never caught off guard. For example, have a saved text/email like: “Hi [Name]! Thank you for contacting [Your Business]. We'd love to help you [achieve their goal]. I'm free to chat now – what's the best number to reach you?” Also, set up notifications inside your CRM so no web inquiry sits unnoticed.
- **Extend Availability:** If possible, establish coverage for lead responses beyond 9 to 5 hours. Consider an on-call staff or even an answering service/AI assistant after hours, to make sure evening or weekend inquiries still get a near-immediate reply.

## Step Two: Persist and Nurture Every Lead

Not every lead will book a consult on the first call or message. Often, people inquire and then hesitate or get busy. This is normal – and fixable! The fortune is in the follow-up. Don't give up after one touch because many potential clients or patients shop around or need a nudge. If you don't implement a system for follow-up, you risk leads going elsewhere.

- **Follow Up Methodically:** For each new lead that doesn't book immediately, create a short follow-up sequence. For example, if you spoke on Monday and they weren't ready to schedule, send

a friendly follow-up text or email by Tuesday thanking them for their interest and offering to answer any questions.

- **Provide Value in Follow-Ups:** In your follow-up messages, include a bit of value or trust-building content (not just “Are you ready to book?”). For example, share a link to a quick before-and-after testimonial on your site, or mention a positive result another client got to remind them of their desired outcome and build credibility.
- **Use Multiple Touchpoints:** Don’t rely on just one channel. If you’ve emailed and gotten no reply, try a quick phone call or a text. Some people prefer calls; others respond to texts. Meet them where *they* are.
- **Be Politely Persistent:** It’s okay to follow up a few times if you do it in a helpful way. Many clients or patients book on the second or third follow-up once you address their questions or objections.

### Step Three: Frictionless Scheduling

Examine your booking process from the client’s perspective and streamline it like crazy. Make it effortless, as simple as clicking a link or a quick call to get on your calendar.

- **Enable Instant Booking:** If you don’t have online booking yet, now’s the time to implement it. Modern consumers expect to be able to book an appointment online 24/7. An outdated or slow scheduling system (or playing phone tag) will cost you clients.
- **Simplify the Steps:** Take a hard look at how many steps a client must go through to book. Do they have to fill a long form first? Wait for a call back? Cut it down. The process should be short and intuitive – think “two clicks and done.” Test it yourself!
- **Train Staff for On-the-Spot Booking:** Your front desk (and any team member who might interact with leads) should be empow-

ered to book a consult on the first interaction. If a prospect calls with a question, the call should ideally end with a scheduled appointment. Achieving this objective may require a quick internal training on your booking software for all staff.

- **Offer Scheduling Options:** Some people prefer to call; others prefer online forms. Offer both. The easier and faster it is to schedule, the more consults you'll get – and you'll prevent those “I'll do it later” procrastinations that never happen.

#### Step Four: Train Your Team to Talk About Value & Outcomes

Every member of your team – from the receptionist answering the phone to the practitioner in a consult – must speak the language of value, outcomes, and ease. It requires focusing conversations on what the client cares about (their results and experience), rather than just the technical details or price.

- **Emphasize Benefits, Not Just Features:** Coach your team to always connect the features of a treatment to the benefits for the client. Everyone on your team should use this value-focused approach in all consults and even initial calls.
- **Avoid Info-Dumping on Inquiries:** When a prospective client or patient reaches out with a question (especially about price), don't overwhelm them with technical info or a price list over the phone – your goal is to get them excited about the *outcome*. For instance, if someone asks, “How much does CoolSculpting cost?”, a trained staff response might be: *“CoolSculpting is an amazing treatment for reducing fat without surgery – our clients love their results. The exact cost depends on your goals; we really customize it. Why don't we do this – let's get you in for a free consult with our specialist so we can give you a precise quote and see if CoolSculpting is perfect for you.”* This kind of response addresses the question and then uses an assumptive close to schedule the consult.

- **Implement Simple Scripts & Role-Play:** Develop a few simple scripts for common scenarios and instruct your staff to practice them. Create scripts for greeting callers, handling price questions, describing a popular treatment's benefits, and the final ask (booking the consult). Practice these via role-play in a team meeting to make everyone sound confident and natural.
- **Align on Value Messaging:** Make sure your entire team knows your one-liner – basically, the one-to-two sentence answer to “Why choose us?” If a staff member isn't knowledgeable yet, train them up – until then, do not allow them to talk to new leads.

### Step Five: Turn Consultations into Commitments

Now, focus on what happens *during* and at the *end* of a consultation, because this is where an interested prospect becomes a paying client. You've done the work to get them in; it's time to optimize your consultation process to convert. I am not talking about high-pressure sales but guiding the client toward a decision by focusing on their goals, addressing concerns, and making it easy to say “yes.”

- **Start with Their Goals:** An effective consultation feels personal and concentrated on the client or patient's desired outcome. Begin by asking an open-ended question that gets them talking about what they want. This simple step builds trust and urgency: they've identified their problem and believe you have the solution.
- **Present Solutions as Outcomes:** When you recommend your solution during the consult, frame everything in terms of benefits and outcomes (just as you trained in Step 4). Tie each recommendation to what *they* already told you they want.
- **Handle Objections with Empathy and Options:** Be ready for common hesitations, such as price, fear of pain, level of time or money commitment, or even side effects. The worst thing you can do is dismiss an objection; instead, acknowledge and address it.

When you speak to their concerns calmly and knowledgeably, you build trust and reduce reasons to say no.

- **Ask for the Commitment:** Many wellness practitioners make the mistake of finishing a consult with an open-ended “Let us know if you have any questions,” then send the client or patient on their way to “think about it.” Instead, make it easy for them to commit to making the change for themselves on the spot. Remind them of the goals they shared with you. In this way, you demonstrate your genuine care and interest in helping them, not just making a sale.

### **Step Six: Solidify the Commitment – Follow-Up After Every Consult**

For consultations that do convert immediately, congratulations – you’ve got a new client! If they *don’t* commit on the spot, all is not lost. A thoughtful post-consultation follow-up can often tip the scales and turn an undecided prospect into a paying client. Don’t consider the consult the end, but the beginning of an ongoing conversation.

- **Send a Thank-You & Recap:** Within 24 to 48 hours after a consultation (same day is even better), send the person a thank-you message. Since a genuine thank you is rare these days, it leaves a great impression.
- **Provide the Plan in Writing:** If you created a recommended treatment plan or discussed specific options, include that in your follow-up. People forget details, and an undecided client or patient might remember only bits and pieces. As a bonus, they’ll re-read the benefits and picture the results. This positions you as a professional partner invested in their outcome, not just someone trying to sell them something.
- **Stay Available and Personable:** Make it clear in the follow-up that you’re there for questions or even a second discussion. It

shows you genuinely care about them reaching their goals.

- **Track Your Conversion Metrics:** Since this 90-day plan facilitates *measurable* results, start tracking two critical numbers: Lead-to-Consult conversion (what percentage of leads or inquiries actually schedule a consult) and Consult-to-Treatment conversion (what percentage of consults turn into paying clients). What you measure, you can improve.

## **Week Eight: Turn Happy Clients into Your Most Powerful Booking Engine**

During this week, you'll implement simple structures to make referrals and reviews happen naturally, consistently, and without awkwardness — because you're building on genuine excitement, not forcing it. Now it's time to activate one of the most reliable, high-converting growth levers of your practice: your happiest clients. No, you're not creating a referral "campaign." You're creating a culture where referrals become a natural extension of your achieved outcomes.

### **Step One: Identify the RAVE Moments**

As we discussed in Chapter 6, a RAVE moment is any point where a client is clearly experiencing progress, excitement, or relief. Now we're going to define what a "RAVE moment" looks like in your practice and teach your team to recognize it.

A RAVE moment might sound like:

- "I feel amazing."
- "My skin has never looked this good."
- "I wish I'd done this sooner."
- "I haven't moved this well in years."

While you've never had to force these moments because they already happen, you do want to establish a system around them.

Your action this week is to:

- Document and share examples of RAVE moments with your team
- Train them to pause and recognize those moments verbally
- Normalize saying things like, *“That’s so exciting to hear — your results are incredible.”*

Recognition costs nothing, but it primes everything that follows.

### **Step Two: Decide When and How You’ll Ask (Without Making It Weird)**

Next, you’ll define *when* it makes sense to ask for reviews or referrals to prevent your team from guessing or avoiding it altogether. Collaborate together to determine which RAVE moments should trigger a review request, and when it’s the right time to open the door to referrals. Discuss who should be responsible for identifying those opportunities, and then who is responsible for the request because it might or might not be the same person! Your task here is to establish an intentional system so you never miss a RAVE moment.

Instead of scripts, give your team permission-based language, like, “Letting others know they can achieve that kind of results really helps our practice connect with the people who need us!” The key is timing. Asking works best after recognition, not at random. When you connect the request to genuine excitement, it feels like a continuation of the conversation instead of a transaction.

### **Step Three: Establish Simple Value and Rewards**

Now you’ll decide how your practice will acknowledge and reward advocacy. It does not need to be elaborate, but it does need to be con-

sistent. Create your plan for how you'll acknowledge referrals (personal thank-you, note in account, social shout-out) and whether or not you'll offer a small account credit or bonus. You may also want to track referrals internally, assign a responsible team member, and outline the process that captures every aspect of your RAVE system.

Remember that when a client or patient refers a friend, they've put their reputation on the line for you. Acknowledging that effort builds loyalty and makes future referrals more likely.

#### **Step Four: Automate the Follow-Up That Supports RAVE**

Automation is where RAVE becomes scalable. Once you fully establish your referral system, you can map a simple automation that supports loyalty without losing the human touch. Your automation can begin with a post-appointment check-in, asking about their experience. If they provide a positive response, invite them onto a path that includes reviews and referrals. If they respond to the survey with a negative response, it's an opportunity to open up a private conversation. Nothing about this process should feel "automated" to the client or patient. It should feel personal, caring, attentive, and thoughtful, because it is.

#### **Step Five: Stay Present (But Not Intrusive) Between Visits**

Finally, this week concentrates on maintaining connection to keep your practice top-of-mind even between appointments. Consider sending simple monthly email updates, events, reminders, and links to new blog posts encouraging your clients and patients to follow along on social media. You can also automate recognition of your customer's anniversaries or milestones with your practice. A personal note on their birthday can also help maintain that connection.

Think about how you can make your most valuable customers feel like "insiders" by creating one or two "insider" moments per year (events, previews, workshops). Think like Disney and create special "insider hours" for your events or to debut new offers, treatments, or sessions. These

touchpoints turn clients into raving fans. And raving fans don't just come back — they bring people with them.

### **What Success Looks Like at the End of Week Eight**

By the end of this week, you should have:

- A team that recognizes and responds to client excitement
- A clear, comfortable way to ask for reviews and referrals
- Simple rewards that reinforce loyalty
- Automation that supports relationships
- Ongoing connection between visits

Most importantly, your bookings begin to originate from a new place — a system that creates marketing momentum.

## **Days 61-90: Magnify Your Impact**

### **Week Nine: Measure Success And Scale**

In these last few weeks of your 90-Day Growth Plan, you're going to find the hidden gold in your numbers and use that data to grow faster with less effort. You've built the foundation to Get Found and Get Booked. People are discovering you, engaging with you, and booking with you. Now comes the fun (and surprisingly empowering) part: figuring out what's actually working and doing more of it.

At this point, marketing transforms from feeling like a “black box” to feeling like a scoreboard you can control. It's what we teach our clients at Salt Marketing and we're in good company. The American Med Spa Association plainly states, “Data is the foundation of successful med spa marketing.”

I'm not asking you to become an analyst, just the kind of CEO who can look at a few numbers and immediately know:

- Where you're winning
- Where you're leaking bookings
- What to fix first for the biggest payoff

In the following steps, you're building a simple "CEO dashboard," then using it to make one smart improvement that creates noticeable results.

### **Step One: Build Your "Scoreboard" (One Page, Five Numbers)**

The only thing you need to track are the numbers that tell you where your calendar is being won or lost. Here's the simplest way to think about it: your marketing is a funnel with predictable stages.

**Traffic → Lead → Consult → Client → Repeat/Refer**

Your job this week is to pick the core metric at each stage and put it on one page on a spreadsheet because clarity creates momentum.

Here are the five most important marketing metrics for med spas, wellness clinics, fitness businesses, and functional medicine practices:

#### **One: Website visitors (or "sessions")**

This metric tells you if your visibility is growing. Use GA4 for this.

#### **Two: Lead volume**

How many people raised their hand this week? (Form fills, quiz completions, guide downloads, calls, DMs that requested info — whatever counts as a lead in your business.)

**Three: Lead-to-consult conversion rate**

Of all the leads you got, how many booked a consult/first appointment? In my experience, healthcare practices are often shocked to learn how many leads never book. It's one of the most significant hidden growth levers.

**Four: Consult-to-client conversion rate**

Of the consults you held, how many started a paid plan/package? If you're getting leads but not conversions, you need to "dive deeper," and pay attention to the factors that affect these rates.

**Five: Cost per booked client (or ROI by channel)**

This is where your business gets smarter. Not "cost per click" or vanity metrics. You want to know: *How much did it cost to get an actual booking... and what did that booking turn into?*

If you only track these five metrics, you'll be ahead of most wellness businesses.

**Step Two: Tag Your Leads So You Know What's Working**

If you can't tell where your best clients came from, you can't scale what works. That's why you need a simple custom field in your CRM to identify lead sources. Keep it basic — no need for 25 options. Use a short list that reflects reality, like:

- Google
- Social (Instagram/Facebook)
- Email
- Referral
- Paid (Meta / Google)
- Event / partner

A marketing channel might produce *leads*, but not *your ideal clients*. The goal isn't to get more leads, but more of the right leads. Look at those clients who become raving fans and refer others, those whose Lifetime Value is 10 to 20 percent higher than others. If you're tracking lead sources, you'll know exactly where those ideal clients originate and you can duplicate that success.

### Step Three: Play Spot the Bottleneck

Here's the fastest way to use data without overwhelm: play spot the bottleneck by looking at your funnel and asking, "*Where is the drop-off biggest?*"

- If you have **traffic but low leads**, your website is unclear or your CTA/list builder isn't compelling.
- If you have **leads but low consults**, your follow-up speed, scripts, or booking process are the issue.
- If you have **consults but low closes**, your offer positioning, proof, or objection-handling needs work.
- If you have **bookings but low retention**, the experience and follow-up need tightening.

This is how you turn "I think marketing isn't working" into "Oh—*this* is the leak."

### Step 4: Calculate ROI by Channel

In Step Two, we talked about looking at clients by lead source or channel. In this step, we want to look at each channel to determine its effectiveness on its own. Understanding the data by lead source can help you better understand which channel is most effective at each stage of your funnel.

For each channel, track:

- **Number of leads generated**

- **Booked consults**
- **New clients/patients**
- **Revenue generated (even estimated)**

Then ask the question that changes everything: *Which channel is producing the best clients or patients, and which one is consuming time without results?* At this stage, you can stop treating all marketing equally and invest based on proof.

### **Step Five: Choose One Metric to Improve**

Your action here is to identify one smart improvement that compounds. Choose the single metric that, if improved by 10 percent, would create a noticeable impact in the next 30 days. Share your findings with your team and set a goal. For example, you might identify that you have plenty of leads coming in and simply need to improve your conversion rates by responding faster with more results-based information.

Or you may simply want to increase the number of online bookings by strengthening your above-the-fold messaging and CTA placement. Whatever you choose, make sure your team is aligned and working together. Once you reach the goals you've established, set a new goal to work on a different metric and incrementally improve your marketing efforts.

### **Step Six: Hold a Monthly “CEO Scoreboard Meeting”**

This habit makes your marketing work long-term. Once a month, sit down (alone or with your team) and look at what numbers have improved, which metrics have fallen, and what numbers present opportunities you want to leverage to bring in new business.

This process keeps you out of emotional decision-making (“Marketing isn’t working!”) and into leadership decision-making (“Here’s the lever we’re pulling next.”).

## **Week Ten: Implement Organic Growth Strategies**

Organic growth is the long game in marketing, but it's also one of the most powerful and cost-effective ways to grow a med spa, wellness practice, fitness studio, or healthcare business. Expand your reach, deepen trust, and attract new clients without your ad spend (yet). Organic content builds trust in a way paid advertising simply can't. When someone sees a friend like, comment, share, or talk about your business, that credibility transfers to you instantly. It feels real and safe. And it leads to bookings.

This week focuses on choosing a small number of organic strategies and executing them consistently and intentionally to show up well in the places that matter most.

### **Step One: Think “Search Everywhere Optimization”**

Ask yourself, “Where do my ideal clients go to find answers to their questions?” They may turn to social media but explore more deeply with AI search. They may subscribe to emails from various vendors or resources to stay informed about what's available to solve their challenges. If many of your clients tell you they found you on Google, you know that they're still using more traditional online search.

Thankfully, you can choose to produce content that helps you show up in a wide variety of search options. That's why I like to say that it's no longer Search Engine Optimization but Search *Everywhere* Optimization.

### **Step Two: Create a Calendar of Content That Builds Trust**

Organic content avoids cleverness in favor of clarity, helpfulness, and humanness. Your goal is to create content that answers real questions your ideal clients already have and shows them what's possible. Think about short-form videos (you can batch-record and edit into multiple videos), and educational articles on your website that explain, inform, and position you as the guide.

Get your results front-and-center with before and after examples and client transformations stories that highlight outcomes, not procedures. Think about sharing “behind the scenes” moments that humanize your practice. Remember, you don’t need to go viral; you need to be relatable, recognizable and trustworthy. Make this helpful mindset shift: instead of asking, “*What should I post?*” ask, “*What would make someone feel more confident booking with us?*”

Brainstorm a week’s worth of content in one sitting if you can or take it one step further and determine a cadence for your posts. That might mean success stories on Mondays, outcomes promotion on Wednesday, educational content on Thursdays and behind the scenes on Saturdays. Remember, you do not have to post multiple times a day. Consistency beats volume every time.

### **Step Three: Build Your Email List**

Email remains one of the highest-ROI marketing channels, especially in healthcare and wellness. because it consistently connects you to people who already trust you. In fact, it’s been said that for every dollar you spend on email, you’ll reap a \$37 ROI!

So now, give your people a reason to join your email list, make it easy for them to sign up, and offer them a reason to stay. You already created a list builder earlier in the plan. Now leverage it to your advantage. Make sure it’s featured prominently on your website — maybe with a pop-up that allows visitors to opt-in. Share your opt-in regularly on social media, monthly at a minimum but more often if it makes sense. Remember that you can highlight one little item of value inside your list builder magnet to promote the opt-in. Be sure to mention your guide, quiz, etc. in person to your prospects and current clients and patients so they can tell others, and don’t forget to link up your list builder in your bio and email signature.

Then commit to a simple rhythm: after someone has completed your welcome nurture sequence, drop one helpful email per month. That’s enough to get started. Share tips, seasonal reminders, education, or encouragement to maintain a presence and nurture relationships.

## **Step Four: Build Trust Through Collaborations**

If you've ever heard the phrase, "Show me your friends and I'll show you your future," that's what this section is all about. One of the fastest ways to reach new people organically is to partner with someone who already has their trust. Start by identifying two or three potential collaborators who are around the same size as your practice, or maybe even a bit larger. These collaborations should enhance your clients' lives, so think of related but not competing services, such as:

- Gyms, yoga studios, or physical therapy clinics
- Recovery clinics that offer cryo, red light, or IV therapies
- Med Spa and aesthetics clinics with confidence-boosting treatments
- Bridal shops, salons, or boutiques
- Hair or beauty salons and spas
- Nutritionists, chiropractors, or wellness coaches
- Local influencers with a small but engaged following
- Community organizations or business groups

Once you've identified potential partners, start simple. When you approach them, remember that you're not pitching a massive campaign — just opening a conversation around how you might support one another. Ideas that work well can be a co-hosted educational event or workshop, going live on social together or creating joint videos, or trading off in-office open-houses to give clients and patients the opportunity to learn about both businesses. You can also send out emails on the other's behalf and offer cross-promotions.

When done well, collaborations feel natural and generous, and they can dramatically expand your reach!

### **Step Five: All Marketing is Local**

Remember that while online visibility is powerful, local presence still matters deeply in the wellness industry. Consider hosting an in-office event like a workshop or hold quarterly open houses to prepare your clients and patients for the upcoming season. Enlist your team to help you participate in local events like community fairs, races or charity events. You don't need a huge turnout. Even 10 to 20 engaged people can lead to meaningful growth, especially when you build relationships face-to-face.

Local visibility reinforces everything you're doing online and positions your practice as part of the community, differentiating you from others who might not be willing to take the time to get involved.

### **Step Six: Track Engagement, Not Just Output**

Organic growth takes time, but it still deserves measurement. Pay attention to what resonates with your audience. Identify the posts or emails that receive opens, clicks, replies, saves, or shares. Track which topics spark conversations or questions and which collaborations lead to new followers or leads. I've said it before and I'll say it again: don't chase vanity metrics. Pay attention to signals of trust because they tell you what to double down on next.

### **Week Eleven: Add Paid Growth Strategies**

Paid advertising can be unbelievably powerful for med spas, fitness, medicine, and wellness practices...but only after establishing a solid foundation. If you've followed what I've taught you about how to Get Found & Get Booked, you *do* have the necessary foundation: clear messaging, a clean booking path, a list builder, automated follow-up, outcomes-based packages, and a customer journey that reflects how real humans decide. Now, you can turn your best content into a predictable booking engine without sounding like everyone else.

This week guides you through creating a simple paid system that respects regulations, earns trust, and ushers people to one clear next step: book (or join your list if they're not ready yet). At this point, you're finally ready to use paid ads the right way — not as a Hail Mary, not as a “boost this post and hope,” and definitely not as “send everyone to the homepage and pray they figure it out.”

You're creating a smart, controlled test for iteration and explosive growth.

### **Step 1: Start with the Proper Guardrails (So Your Ads Get Approved)**

Health, wellness, medical, and aesthetics ads live under stricter scrutiny for good reasons. Both Google and Meta have policies that restrict certain healthcare-related content, targeting, and claims. If you ignore those guardrails, your ads may get rejected...or worse, your account can get restricted.

The safest approach is to lean into trust and authority. That means educational, helpful, accurate, non-sensational marketing that respects privacy and avoids “calling out” someone's condition. Also keep an eye on emerging restrictions for “health and wellness” advertisers on Meta that can limit optimization and targeting options.

To create compliant, HIPAA-safe, premium-positioned ads, follow each platform's rules (find and bookmark these for reference as you build):

- Google Ads “Healthcare and medicines” policy<sup>2</sup> (what's restricted, what requires certification, what's prohibited)
- Meta's Guidelines & Personal Attributes policy<sup>3</sup> (don't imply someone has a medical condition or specific health status).

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2. Google Ads “Healthcare and medicines” policy – <https://support.google.com/adspolicy/answer/176031>

3. Meta's Guidelines & Personal Attributes policy – <https://www.facebook.com/business/help/248923537779939?id=434838534925385>

A practical interpretation of “personal attributes” for your ads: Avoid language like “Struggling with acne?” “Tired of being overweight?” “Do you have anxiety?” because it can be interpreted as implying the viewer has a condition. Instead, shift to educational framing: “Acne treatment options explained” or “What to know about...” while keeping your messaging client-centered and hopeful.

If you are unsure, do not “guess.” Read the policy pages above first, and when in doubt, strive for conservative, educational language that builds credibility. Working with an agency that understands this industry can help you stay compliant and get better results with less anxiety.

### **Step 2: Focus on One Conversion Goal**

Most practices fail at ads because they try to connect with anyone and everyone by advertising their practice as a whole. Resist the urge to cast a wide net by promoting every solution you have to offer. Remember that people are never going to spend the time to figure things out, and unless they see what they’re looking for, they’re going to scroll right on past your ad.

To solve this problem, you’ll need a wider variety of ads and creativity, with each variation aimed at capturing the attention of a particular prospect. Keep it simple for them. Choose one problem this prospect wants solved. Focus on one outcome-based solution you offer and give them one clear next step.

You might want them to “Book Your Free Consultation,” “Download My Guide,” “Take Our Quiz,” or “Schedule Your IV Online Now.” Be clear and differentiate your practice with *your* call to action. If your ad could describe any other practice in town, it’s too generic.

### **Step 3: Match Ads to the Customer Journey**

When you begin using paid advertising, it’s helpful to understand *where* someone is mentally when they see your message, not because of marketing jargon but human behavior. Every prospect moves through a journey be-

fore they ever book, and that journey closely mirrors the customer journey you mapped out in Week Two of your 90-Day Growth Plan. The difference is simple but important: it's the prospect's journey, happening entirely in *their* mind.

Some people are just beginning to realize they have a problem. Others are actively comparing options. And a smaller group, usually around 3 percent of your universe at any given time, is nearly ready to book — they just need reassurance. Paid advertising works best when your message matches these moments and meets your prospect where they are.

Think of this journey in three stages and structure your paid campaigns around them.

At the beginning of the journey — what we call the “top of the funnel” — people are problem-aware, but not solution-aware. They know something doesn't feel right. They may be researching symptoms, frustrations, or outcomes they want to achieve, but they're not yet looking for a specific treatment or provider. This is not the moment to push a booking button. In fact, doing so too early often backfires.

At this stage, your role is to educate and build trust. Short, approachable videos that explain what's happening or what options exist are incredibly effective. So are “myth vs. truth” conversations, explanations of what to expect, or guidance on how to choose the right approach. You're helping them feel informed and safe, not sold to. The most natural next step for someone in this phase is to join your list by downloading a guide, taking a quiz, or watching a short educational video that helps them make sense of their situation. To target someone at the top of the funnel, focus on keywords that reflect questions, symptoms, frustrations, or desired outcomes, not specific treatments or brand names.

As people move further along the journey, they enter the middle stage. Here, they are solution-aware, but not yet sure about you. They've done enough research to know what type of service or treatment they're looking for. Now they're comparing providers, weighing options, and asking quieter questions like, “Who can I trust?” and “Is this the right fit for me?”

This is where differentiation matters. Your advertising should clearly communicate how your approach is different, what qualifies you to help, and what the experience of working with your practice actually feels like. This is the moment to share your philosophy, outcomes, credentials, and manner of caring for clients or patients. Social proof becomes powerful here as reassurance. For a middle-of-funnel prospect, choose keywords that show you understand the type of solution they're looking for and that they are still comparing options. These searches often include treatment names, service categories, or phrases like "best," "near me," or "cost of," signaling that they're evaluating providers and deciding who they can trust. For someone in this stage, the next step often feels right when it's an invitation to book a consultation or request a personalized plan.

Finally, there's the bottom of the journey — the point where someone is ready but still needs guidance. These prospects are close. They're reading reviews, checking pricing, and narrowing their options. What they need now is confidence. Someone who is ready to book is searching with clear intent and specificity. Their keywords often include your services (and if you're really doing a great job, your practice name), plus strong action or trust signals, such as "book," "schedule," "appointment," "reviews," "pricing." If they're searching on your practice name, they're showing they've decided on a solution and are looking for the fastest, most convenient way to get started.

Your job at this stage is to remove hesitation and make the path forward clear. Testimonials, results stories, and clear explanations of what happens after booking all help reduce uncertainty. This is where clarity beats creativity. When people know exactly what to expect and feel confident in the process, booking becomes easy. For these prospects, direct scheduling is the right next step.

Understanding this journey and aligning your ads to it helps you avoid wasting money on messages that miss the moment. When your advertising meets people where they are, instead of where you wish they were, paid growth becomes more effective and human, and far more profitable.

#### **Step 4: Use Your Best Organic Content as Your Ads**

One of the most powerful and overlooked paid advertising strategies is also one of the simplest: don't start from scratch. Instead of inventing new ad content and hoping it lands, use what has already proven itself.

Look back at your organic content. If a video, Reel, post, or even an email sparked strong engagement in the form of comments, saves, shares, replies, or DMs, that's your signal. Your audience has already told you, "This matters to me." Paid ads simply amplify what the market has validated. You're not guessing; you're scaling what works.

Identify two or three pieces of your highest-performing organic content and repurpose them as ads, especially short-form video. Keep the tone educational, confident, and human, exactly as it performed organically. When you lead with real value and authenticity, your ads stand out in a feed full of generic promotions and forgettable specials.

This approach performs better *and* feels better. You're not shouting for attention; you're extending a conversation that's already resonating.

#### **Step 5: Clarify the Next Step (a.k.a. "Don't send them to your home page!")**

Let's be honest for a moment. If you've run ads in the past, there's a good chance you sent people to your home page and hoped they would "look around" and figure out what to do next. Almost everyone does this at first since it feels logical. However, in practice, it creates friction, confusion, and missed bookings.

Recognize the hard truth: your home page is not a decision page. When someone clicks an ad, they're responding to a very specific message. Sending them to a general page forces them to reorient themselves, hunt for information, and make too many decisions at once. Rather than marketing, you're asking your prospect to do extra work.

Now that you understand the customer journey, you can do better — and get better results.

Every ad should send someone to a page built for one clear next step, based on where they are in their journey. Someone who is just becoming aware of their problem should land on a quiz or guide that helps them make sense of it. Someone who understands the solution but is still evaluating options should land on a service or outcome-focused page that builds trust and clarity. And someone who is ready to move forward should land directly on a booking page that makes it easy to say yes.

Just as important, the page they land on should feel like a natural continuation of the ad. It should immediately reinforce the promise they clicked on, with an unmistakable outcome and an obvious next step. Keep distractions to a minimum so they can stay focused.

If you've ever felt like ads "almost worked," this is often the missing piece. If you make only one improvement to how you run paid advertising going forward, let it be this: stop sending people to your home page and start guiding them intentionally to the next right step.

### **Step 6: Do the Math So The Budget Makes Sense**

For many practice owners, paid advertising has always felt a little mysterious. Money goes in, something happens (maybe), and you're left wondering whether it was worth it. The uncertainty doesn't come from the ads themselves but from never slowing down to look at the numbers discernably. But once you do, paid advertising begins to feel surprisingly logical.

Everything begins with understanding the value of a new client or patient in your practice in real dollars. Maybe your average first purchase is a \$1,200 package. Maybe it's a \$250 initial visit that typically leads to ongoing care. Either way, you likely already know this number, you've just never connected it to your marketing decisions before.

Next, you begin to look at how people move through your system. Not everyone who clicks an ad becomes a lead. Not every lead books. Not every consult converts. That's normal. What matters is understanding the *pattern*. For example, if you drive paid traffic to your landing page and

about one in five people raises their hand, that's a 20 percent conversion rate. If about half of those leads book a consult, and a portion of those consults become clients, you suddenly have a clear picture of how your investment in paid ads turns into revenue.

Once you see that flow, the math becomes surprisingly approachable. Imagine one hundred people clicking your ad. If twenty of them become leads, ten book a consult, and four become clients, you now understand how your system performs. It removes guesswork and replaces it with a series of small, predictable steps.

Now layer in cost. If each click costs around three dollars, those one hundred clicks cost three hundred dollars. If that spend produces four new clients, you've effectively spent seventy-five dollars to acquire each one. When you compare that to the value of a new client, especially in a practice where relationships and lifetime value matter, that number suddenly feels significantly different. Done right, it feels exciting.

The mindset shift that you are not buying ads but investing in outcomes changes everything: you're deciding, intentionally, how much you're willing to spend to generate a booking, start a relationship, and create long-term value.

As you get comfortable with this way of thinking, you'll naturally start estimating things like the cost of a lead, a booked consult, and a new client acquisition. You're not looking for perfection in your numbers, just enough consistency to guide smart decisions.

That's where return on ad spend (ROAS) comes in. It's simply the revenue generated divided by what you spent. If you invest a thousand dollars and generate five thousand in attributable revenue, that's a five-times return. Remember when we talked about tracking your lead sources? Benefitting from this insight doesn't require complex attribution models or fancy dashboards. You simply need a realistic model and the confidence to review your numbers without fear.

When you understand the math, it takes the emotion out of paid advertising. You're no longer wondering, "*Is this working?*" You're calmly deciding, "*Is this worth scaling?*" And that's exactly how a CEO should approach growth.

## **Week Twelve: 99 Ways To Fill Your Booking Calendar**

Week 12 has one purpose: momentum. At this point, you've laid the foundation with clear messaging, tight systems, and the realization that trust-based wellness marketing actually works. But even with a solid strategy, every practice hits moments where the calendar goes rogue, requiring a fast, tactical playbook.

That's exactly why this "99 Ways to Fill Your Booking Calendar" list lives in Week 12 of your 90-Day Growth Plan: it's your rapid-fire idea bank for generating demand, creating urgency, and activating new and existing clients without spinning into chaos. Bookmark it, highlight the ideas you like...and check off each one you take action on. Then, come back anytime you need a fresh surge of bookings, a new campaign spark, or a simple action you can assign to your team today.

### **33 Ways to Attract**

**1, Max Out Your Google Business Profile** – Claim and fully optimize your Google Business listing with up-to-date info, keywords, photos, and service areas to increase your visibility in "near me" searches and drive more local traffic to your page.

Why: A complete profile appears more in search and maps, leading to more clicks and bookings.

**2. Dominate Local SEO** – Your website must target local keywords (like "wellness center in [City]"), content accurate contact info, and be mobile-friendly. Write content and meta-tags focused on your region and services so nearby clients find you first on Google.

Why: Ranking high for local searches means constant organic traffic of people actively seeking your services.

**3. Capture Search Questions with Content** – Regularly publish short blog posts or FAQs answering common client questions (“How does IV therapy work?” or “Best post-workout recovery tips”).

Why: Responding to these queries educates your prospects and improves your search rankings, attracting interested readers who can turn into bookings. Helpful content builds trust and draws in people searching for solutions that you provide.

**4. Encourage Rave Reviews** – Ask happy clients to leave Google or Yelp reviews and make it easy with a direct link. Respond to every review professionally. Glowing testimonials make you stand out and give hesitant prospects confidence to book.

Why: People trust peer experiences; a strong review profile can tip the decision in your favor when new clients compare options.

**5. Leverage Local Directories & Listings** – Get your business listed on local wellness directories, Yelp, and health platforms (like Mindbody, ClassPass, or Psychology Today if relevant). Your Name, Address, and Phone (NAP) must be consistent across all listings to broaden your online footprint and funnel local leads your way.

Why: The more places clients find you online, the more inquiries you’ll get – plus consistent info boosts your local SEO.

**6. Join Local Online Communities** – Participate in local Facebook groups, Nextdoor, or community forums related to health and wellness. Offer helpful advice (not just ads) and become *the* friendly local expert. When someone needs a service you offer, neighbors will tag you as the go-to pro.

Why: Being visible and helpful in community networks builds word-of-mouth and trust, which turn online acquaintances into new appointments.

**7. Social Media Education Blitz** – Consistently post quick, valuable tips on your social media (Instagram, TikTok, Facebook). For example, a one-minute video on stress relief breathing or a myth-busting post about nutrition. Use local hashtags and geo-tags.

Why: Useful, shareable content positions you as an expert and keeps you on your followers' minds – so when they need a service, you're the one they recall and book.

**8. Show Your Human Side Online** – Share behind-the-scenes peeks of your facility, staff spotlights, or day-in-the-life stories on social media. Let your passion and personality show. People connect with people, and this warmth can attract clients who feel they know you.

Why: Trust is paramount in wellness. When prospects see the real humans and caring environment behind your brand, they'll feel more comfortable booking that first visit.

**9. Go Live and Do Q&As** – Host live sessions on Facebook or Instagram where you answer common questions or discuss hot wellness topics. For instance, a mental health counselor might do a live "Ask a Therapist" chat. Promote it locally and save the recording to re-use.

Why: Live interaction boosts engagement and showcases your expertise in real time. Viewers who receive answers to their questions are more likely to convert to bookings because you've built credibility.

**10. Ride Trending Topics** – Create content that riffs on popular wellness trends or celebrity health crazes, explaining them and offering your professional take. Example: "What's the deal with the latest green juice cleanse and is it right for you?"

Why: Trending topics are search magnets. By jumping on what's popular, you draw in curious locals and position your practice as up-to-date and in-the-know – enticing new clients who want the real scoop.

**11. Host a Free Wellness Workshop** – Offer a no-cost seminar or demo at your location or a community venue – on a topic of interest (stress re-

duction techniques, skincare 101, nutrition for busy moms, etc.). Provide valuable tips and a small freebie or discount for attendees.

Why: Workshops showcase your expertise and let people experience your value risk-free. Attendees get excited and are likely to book a full session or package afterward since they've gotten a personal taste of what you offer.

**12. Throw an Open House Event** – Organize a lively open house at your facility with mini service demos, facility tours, and maybe healthy snacks. Invite the public and encourage your current clients to bring friends. Have a special “today only” booking offer for attendees.

Why: An open house lowers the barrier for new folks to walk in and meet you. The fun atmosphere generates buzz, and those who attend can transition straight into scheduling an appointment while their interest is high.

**13. Team Up with Complementary Businesses** – Partner with another local business that serves a similar clientele. For example, a med spa teaming with a yoga studio or a nutrition coach with a gym. Cross-promote each other's services, create a joint package, or host a combined event. Partnership marketing doubles your reach.

Why: You tap into an established audience that trusts your partner business, meaning instant warm leads who are primed to become your clients too.

**14. Tap Corporate Wellness** – Reach out to local companies and offer a corporate wellness program or lunch-and-learn session. For instance, a fitness studio might run a stress-relief stretch class at a tech firm, or a therapist could give a talk on work-life balance. Offer employees a special rate to book your services.

Why: Businesses appreciate wellness for their teams. By helping them out, you gain exposure to potentially dozens of new clients at once, and the company's endorsement makes employees more likely to book with you.

**15. High-End Collabs** – Align with a luxury local retailer or service. Think a spa partnering with a high-end boutique or a nutritionist with an organic gourmet shop. Co-host VIP events or bundle a service with one of their products for a unique package.

Why: You'll impress an upscale audience that values quality. This kind of cross-promotion augments your brand, and those clients often have the spending power to become some of your best, most frequent bookers.

**16. Befriend Allied Health Pros** – Build a referral network with doctors, chiropractors, hairstylists, salon owners, physical therapists, or any professional whose clients might need your services. Send them info about what you do and invite them to tour your facility. Return the favor by referring your clients to trusted partners.

Why: A nod from another trusted professional is gold. Referrals from these sources come in already trusting you, making them far more likely to book and stay with your practice long-term.

**17. Be a Local Media Expert** – Pitch yourself to local newspapers, radio shows, or community magazines as a wellness expert available for commentary. Send a press release when you launch a new service or have a success story. Even a small mention in the local press or a five-minute radio spot can flood you with inquiries.

Why: Free publicity raises your credibility fast. When people hear or read about you in a respected local outlet, you instantly become the go-to authority in their mind – and the one they call for an appointment.

**18. Advertise in Local Media** – Don't overlook traditional local advertising. A small ad in the community newspaper, a spot-on local radio, or a flyer in the neighborhood mailer can grab the attention of residents who prefer old-school media. Target your ad to a seasonal offer or popular service to draw interest.

Why: Not everyone is glued to social media. In particular, local ads can reach older or less techy clients in your area, converting them from read-

ers/listeners into new bookings when they learn about your services close to home.

**19. Micro-Influencer Magic** – Invite a local micro-influencer (think 5K–20K highly engaged followers in your city) for a complimentary service in exchange for them sharing their experience. Often, these are fitness instructors, mom bloggers, or community figures. Their authentic testimonials can send their loyal followers your way. It’s word-of-mouth on steroids!

Why: A shoutout from a relatable local influencer builds instant trust with a broad audience, many of whom will want to try the same experience and book with you.

**20. Run a Social Media Giveaway** – Launch a contest on Instagram or Facebook where participants enter by tagging friends, sharing a post, or signing up to your email list. The prize could be a free session or a wellness basket (perhaps co-created with another local business). Contests create buzz and expand your visibility exponentially as people share.

Why: You’ll capture new followers (potential clients) and generate excitement – plus the winners often turn into some of your most loyal customers after enjoying their prize and seeing your value.

**21. Create an Irresistible Lead Magnet** – Offer a valuable downloadable resource on your website (e.g., “10-Day Clean Eating Recipe Book” or “Guide to Managing Anxiety at Home”) in exchange for an email address. Promote it on social media and local forums. Once people download it, follow up via email with a friendly welcome and an exclusive new-client offer.

Why: A lead magnet lures in interested locals and builds your email list with warm leads. You’re giving before asking – by providing value first, you earn trust, making recipients far more likely to book a paid service with you down the line.

**22. Engage in Guerrilla Marketing** – Do something unexpected and buzzworthy in your community. Chalk the sidewalk with inspiring wellness quotes leading to your door or place a few branded yoga mats in a park with “Free Class – [Your Studio] 6 PM” signs. Low-cost, high-wow stunts get people talking about you all over town.

Why: Guerrilla tactics break people’s routine and get your name in their heads in a fun way. That surprise and delight can translate into curiosity and foot traffic – people will book just to be part of the excitement they heard about.

**23. Distribute Eye-Catching Swag** – Print useful swag (pens, water bottles, stress balls) with your logo and website. Hand these out at local races, health fairs, schools – anywhere your potential clients are. Also leave a stack at complementary businesses (with permission).

Why: Everyone loves free stuff. Quality swag keeps your name in front of people in their daily life (think: a water bottle at the gym), so when they decide to seek a service, your brand is literally in their hand and top of mind.

**24. Network in Local Business Circles** – Join your Chamber of Commerce, Business Networking International (BNI), or local entrepreneur meetups. Polish your elevator pitch and express genuine interest in others. Over time, you’ll become “the wellness person” in their network.

Why: People refer business to those they know and trust. By being active in business networks, you’ll gain a squad of professionals who send clients your way, filling your calendar through referrals from folks outside your usual circles.

**25. Offer a “Bring-a-Friend” Deal** – Create a promotion where current clients can bring a friend to a class or session for free (or at a discount). This works for fitness classes, group therapy workshops, spa days, etc. The friend gets to try it risk-free alongside someone they trust. It’s way less intimidating to try a new wellness service with a buddy.

Why: These tag-along friends often convert into paying clients if they love the experience, effectively turning your happy customer into a recruitment partner.

**26. Make Your Signage Sell** – If you have a physical location, use your windows, sidewalk sign, or marquee to advertise a compelling offer or intriguing message (“Free Wellness Consults This Week!” or a fun wellness trivia) and update it regularly. Every person walking or driving by is a potential client.

Why: Great signage can grab their attention and prompt an impulse inquiry or visit. It turns foot traffic into actual traffic through your door, filling slots with locals who might otherwise pass by.

**27. Direct Mail with a Twist** – Send out a well-designed postcard or flyer to nearby zip codes introducing your business with a limited-time offer (e.g., “New Client Special – 50% off First Massage”). Include a testimonial quote for trust. In the digital age, a tangible mailer can actually stand out.

Why: A compelling postcard on the fridge serves as a constant reminder, and that special offer gives procrastinators a reason to finally book an appointment before it expires.

**28. Start a Local Wellness Challenge** – Create a 30-day challenge (e.g., “30 Days to Flexibility” or “Mindful May Meditation Challenge”) and invite the community to join via social media or an email sign-up. Provide daily tips or mini-tasks, and encourage participants to share progress (maybe with a hashtag you create). Offer a discount or prize for those who complete it.

Why: A challenge energizes people and creates a tribe-like vibe around your business. Participants get results and feel connected to you, and once the challenge ends, they’re primed to continue their journey by booking your paid services to maintain their progress.

**29. Build a Referral Program** – Formalize a referral system by giving clients a couple of referral cards offering their friends a first-visit discount.

When someone redeems, reward the referring client with a gift card or discount too. Promote this program in your office and newsletters so clients know.

Why: Your existing clients are your sales force if you let them know how to help. A referral program motivates and rewards them for spreading the word. New clients come in on a trusted recommendation, and existing clients stick around longer to use their rewards – a win-win that keeps your calendar booked.

**30. Harness “Best of” Awards** – Nominate your business (and encourage your fans to nominate/vote) for local “Best of [City]” awards or lists (Best Spa, Best Therapist, etc.). Feature any awards or finalist placements proudly on your website and social media.

Why: People do look at those “best of” lists when choosing where to go. Being able to say you’re award-winning instills confidence in newcomers, leading more of them to book with the business that’s been crowned one of the best.

**31. Offer Limited-Time Seasonal Specials** – Design promotions around seasons or holidays (e.g., a “New Year, New Upgrade” package in January or a “Summer Fitness Boost” program). Make them juicy and only available for a short window. Seasonal tie-ins create urgency and relevancy.

Why: People are naturally motivated by seasons (think New Year resolutions or summer beach bodies), so a timely offer gives them that extra push to book now rather than “someday.”

**32. Contribute Guest Content** – Write a guest article for a local blog, or offer a few tips for the community newsletter. Alternatively, appear on a local podcast or panel to share advice. Deliver useful insights without heavy self-promotion (your byline or intro will mention your business).

Why: When people see or hear your expertise featured by a third party, it enhances your credibility. You’ll reach new pockets of your community,

and readers/listeners who learned something will seek you out – converting that credibility into consultations and bookings.

**33. Be Everywhere Your Audience Is** – Identify where your ideal local clients hang out and get seen there in person. Gym locker rooms, coffee shops, libraries? Pin up flyers or kindly ask to leave brochures. Attend their community events and introduce yourself. Visibility creates familiarity.

Why: When someone has seen your name around town multiple times, you're no longer a stranger – so when they realize they need a service, guess who they're likely to call first? That consistent presence builds a pipeline of new bookings.

## 18 Ways to Convert

**1. One-Click Booking Convenience** – Offer a stupid-easy, user-friendly online booking system. Embed a prominent “Book Now” button on your website and social profiles that leads to a simple scheduling page. If technology isn't your thing, use a service like Calendly or a scheduling app that clients can use 24/7.

Why: The fewer hoops someone jumps through, the more likely they'll commit. An effortless booking process means when inspiration strikes at 10 p.m., they can self-schedule on the spot – filling your calendar without a single phone call.

**2. Lightning-Fast Lead Follow-Up** – Respond to inquiries and contact form submissions ASAP – ideally within an hour or two. If someone comments on your post asking for info, message them promptly. For calls you miss, call back right away. Speed shows you care and captures clients while their interest is hot.

Why: When a potential client or patient finally reaches out, they're ready to act. A quick response can turn that curiosity into a confirmed appointment, whereas waiting even a day gives them time to lose interest or contact a competitor.

**3. Offer a Risk-Free Intro** – Remove the fear of commitment by promoting a free consultation or a low-cost intro session. For example, a therapist could offer a free 15-minute phone consult, or a personal trainer could offer their first fitness class for free. Emphasize “no obligation, just come see if it’s a fit!”

Why: Many people hesitate to book due to uncertainty. A risk-free intro overcomes that hurdle – and once they meet you and see the value, they’ll be excited to book the full appointment. It’s an easy pipeline from “just checking it out” to becoming a paying client.

**4. Clear Calls to Action Everywhere** – Double-check that every piece of your marketing clearly tells people how to take the next step. Every page on your site should invite them to “Book Your Session” or “Call Now to Schedule.” Every social media bio should have your booking link.

Why: Interested people need a nudge. By explicitly telling them what to do (“Book now for a free consult!”), you guide them straight into your calendar. You’d be amazed how many potential clients just need that direct invitation to act.

**5. Show Off Your Social Proof** – Sprinkle testimonials, star ratings, and mini case studies throughout your website and even your booking pages. Include a few compelling before-and-after stories if applicable (e.g., a client who overcame back pain after your treatment). When prospects are on the fence, seeing proof of others’ success can tip them over into booking.

Why: Trust is the currency of conversion. When someone sees real evidence that you’ve helped others like them, it shrinks their doubts. They think, “This could be me!” – and they’re far more likely to click that schedule button or call.

**6. Address Objections Head-On** – Identify common client hesitations (“Is it expensive?”, “Will it hurt?”, “Do I have time for this?”) and answer them upfront in your marketing. Create an FAQ section or a short video addressing these concerns. For example, a recovery center might have a FAQ: “Can I keep working while in treatment?” with a reassuring answer.

Why: If you answer the “Yeah, but...” in a client’s head before they even voice it, you eliminate their reasons not to book. They’ll feel understood and assured, making it easier to take that next step with you.

**7. Multiple Ways to Book** – Cater to preferences: some people hate phone calls and love texting. Others are old-school and want to talk. Offer at least two booking methods (online form, call, text, even WhatsApp) and prominently advertise these options.

Why: If you only offer one channel, you lose anyone who doesn’t like that method. When you provide choices, every personality type finds a comfortable way to commit. More paths to booking = more bookings, period.

**8. Train Your Team to Close** – If you have a receptionist or staff, train them well to convert inquiries into appointments. They should be friendly, knowledgeable, and always ask “Would you like to go ahead and book that now?” at the end of every inquiry call. Consider a quick cheat sheet of answers for common questions and the benefits of booking now versus “thinking about it.”

Why: Every phone call or walk-in inquiry is a golden opportunity. A well-trained team member can turn a curious question into a scheduled client by guiding the conversation, easing concerns, and confidently inviting them to schedule – all in a single interaction.

**9. Create Urgency with Limited Offers** – Occasionally run time-sensitive promotions (“Book by Friday for 20% off your first massage” or “Only 5 spots left for our spring wellness package”) and promote the deadline clearly to push fence-sitters to act now rather than later.

Why: By nature, people are procrastinators. A ticking clock or limited quantity nudges them to stop putting it off and make that appointment – filling your calendar faster than open-ended offers would.

**10. Implement a Waitlist System** – Never let a cancellation go unfilled by maintaining a simple waitlist of interested clients (many scheduling

systems do this automatically). When someone cancels, blast a quick text to your waitlist offering the open slot to the first taker.

Why: A full calendar can quickly spring leaks with no-shows or cancellations. With eager clients waiting in the wings, you can plug those holes immediately, maximizing your booking density and revenue.

**11. Rescue Abandoned Bookings** – If your online booking software shows people who started to book but didn't complete (or if someone DM'd for info and then went quiet), follow up. Send a friendly "Need help scheduling your appointment?" message or email. Sometimes a technical hiccup or a moment of hesitation can stop them, but a quick nudge can save the booking.

Why: Life happens and people get distracted. A gentle follow-up captures those lost opportunities and brings them back to finish scheduling. It shows you care and can significantly improve your conversion rate from interested leads to confirmed appointments.

**12. Live Chat for Quick Answers** – Install a live chat widget or even a chatbot on your website so visitors can get instant answers while they're considering booking. Many folks have a simple question ("Do you accept my insurance?" or "Which class is best for beginners?") that if answered immediately will lead them to book on the spot.

Why: If a visitor can't get an answer fast, they might leave and never return. Live chat keeps them engaged and addresses their concerns in real time. Often that's all it takes for them to feel confident clicking "Schedule." It's like having a friendly concierge 24/7 converting curious browsers into clients.

**13. Simplify Your Forms** – Don't scare off bookings with a daunting sign-up process. Ask only the essentials when someone is booking or requesting info (name, contact, and maybe one or two specifics). Lengthy forms can wait until after they've committed.

Why: Each extra field is an extra chance for someone to say “eh, I’ll do this later.” By streamlining, you remove friction. They can always fill out detailed intake forms once they set the appointment, but a quick and easy initial booking form means more people will cross the finish line.

**14. Display Credentials and Safety** – Prominently display your qualifications, licenses, and any health and safety measures (especially for medical or mental health services) on your site and in the clinic. For example, if you’re a licensed therapist or a certified trainer, let that shine. Seeing “Board Certified,” “10+ years of experience,” or badges of certification can reassure a nervous potential client that they’re in good hands.

Why: Trust is a prerequisite for conversion in wellness. When someone perceives you as legit and skilled, they’re far more likely to commit. Those badges and credentials can quell fears and push them from consideration to booking.

**15. Offer Flexible Scheduling Options** – Show that you accommodate busy lives. Whether it’s extended evening/weekend hours or virtual appointment slots, highlight the convenience. If a client knows they can see you outside their 9 to 5 work schedule or from home, they have one less reason to delay booking.

Why: One big reason people don’t book is scheduling conflicts. By being flexible and upfront about it, you capture those who would otherwise think “I don’t have time.” Convenience can often seal the deal – if it fits their life, they’ll make it happen.

**16. Bundle for a Better Deal** – Create packaged deals (e.g., “Buy 5 sessions, get 1 free” or a bundle of complementary services like a massage + nutrition consult). Present these options at the time of booking or initial consult. Sometimes people just need a nudge to go for a bigger commitment up front.

Why: Bundles increase immediate value perception. A client thinking of scheduling one session might upgrade to a package because it feels like a great deal, instantly filling your calendar for weeks to come. Plus, once

they've bought a bundle, they're definitely booking all those sessions – boosting your utilization.

**17. Pre-Book Next Appointments** – Before a client leaves their session, encourage them to schedule the next one (or even better, their next several). For example, after a successful physical therapy visit or relaxing facial, say “Let’s go ahead and secure your spot in two weeks so you keep progressing.” Possibly offer a small incentive for booking a series in advance.

Why: Capitalize on the post-session glow when they're most convinced of your value. By locking in the next visit right away, you reduce the chance of them forgetting or drifting off, and you keep your calendar consistently filled with returning clients.

**18. Transparent Pricing and Policies** – Make your pricing, cancellation policy, and any other need-to-know info prominent and clear upfront, including on your website and during the initial call. When they feel informed, people are more likely to book – and surprises like hidden fees or strict policies sprung later can deter them.

Why: Uncertainty is a conversion killer. When you present everything transparently, clients feel respected and in control. That confidence in what they're signing up for makes them far more likely to say “yes” and schedule that appointment, without last-minute second thoughts.

## 18 Ways to Create Raving Fans

**1, Roll Out the Red Carpet for New Clients** – Treat first-timers like VIPs. Have a small welcome gift or handwritten thank-you card ready at their first visit. Walk them through what to expect and follow up afterwards to ask how they're feeling.

Why: A stellar first impression turns a one-time visitor into a loyal client. When someone feels warmly welcomed and cared for from day one, they're far more likely to rebook and tell their friends about the awesome experience.

**2. Implement a Generous Referral Program** – Encourage word-of-mouth by rewarding those who send you business. For example, “Refer a friend, and you BOTH get \$20 off your next session.” Make it easy: provide referral cards or a shareable link/code. Mention the program often, in person and in emails, so clients remember it.

Why: Your current happy clients are your best ambassadors. A referral incentive gives them a tangible reason to actively bring others in. It creates a virtuous cycle: more referrals mean more bookings, and the clients who refer stick around to use their rewards, filling your calendar on both ends.

**3. Launch a Loyalty Membership** – Create a membership or loyalty plan for repeat clients. For example, a monthly massage membership, or a “buy 10 classes, get 2 free” punch card, or a tiered VIP club with perks. Highlight the savings and special treatment they get as members.

Why: Memberships and loyalty programs lock in recurring visits. Clients love a good deal and a feeling of belonging. It transforms one-off appointments into ongoing relationships – keeping your schedule full with regulars who’ve essentially pre-booked through their membership.

**4. Personalize Each Visit** – Keep notes on client preferences and details (such as their favorite music during a massage, their birthday, or their dog’s name). Train your team to greet clients by name and ask about something they mentioned last time. These small touches wow people.

Why: When clients feel seen as individuals rather than just another booking, they form an emotional bond with your business. That connection translates to loyalty – they’ll keep coming back where “everybody knows their name,” and they’ll rave about you to others, too.

**5. Surprise & Delight Freebies** – Every now and then, throw in a little extra. Perhaps an extra 10 minutes of treatment, a free sample product, or a complimentary upgrade to a premium service level when possible. Don’t announce it ahead of time – let it be a surprise bonus.

Why: Unexpected generosity makes people feel great and valued. It's the kind of experience they can't help talking about ("I went in for a facial and they surprised me with a free serum sample!"). These happy stories spread, bringing you new clients, and the recipients themselves are more inclined to book again, hoping for more delightful experiences.

**6. Stay in Touch After Visits** – Send a follow-up email or text a few days after a session to ask how they're doing, provide a tip related to their visit, or link to a relevant blog post you wrote. For example, after a deep-tissue massage, "How are you feeling? Here are three stretches to stay loose this week."

Why: Ongoing care tells clients you think of them beyond the transaction, reinforcing the value they received and keeping you on their radar. This gentle nudge often prompts them to schedule their next session ("You know, I am a bit sore; I should book another!") and increases the likelihood they'll refer you since they see you truly care.)

**7. Build a Community Feeling** – Create a private Facebook group or WhatsApp chat for clients where you share daily wellness tips, host mini-challenges, or let them support each other. For example, a nutrition coach could have a group where clients swap healthy recipes. Moderate it so it stays positive and valuable.

Why: People stick with services where they feel they belong. By fostering a community, you're not just a service provider, you're a tribe leader. Clients will stay engaged with you between appointments (and booking more) because they feel part of something bigger – and they'll invite others in, too.

**8. Celebrate Milestones and Achievements** – Track client wins and celebrate them. If a client loses 10 pounds, finishes 10 sessions, or reaches one year with you, recognize it – maybe with a shout-out in your newsletter, a certificate, or a small gift. A recovery center might celebrate 1-year sober anniversaries with a token; a gym might feature a "member of the month" success story.

Why: Recognizing achievements makes clients feel proud and valued, deepening their emotional investment in your practice. Proud clients become loyal clients, and they often share their achievements (and your role in them) with others – which attracts new faces to your door.

**9. Actively Seek Feedback** – Regularly ask clients how you can improve. You can do it via a quick survey link in a follow-up email or a suggestion box at the front desk. More importantly, act on it when you can, and let them know you did (“Thanks to your feedback, we’ve extended our Saturday hours!”).

Why: Clients appreciate being heard. Even if their feedback is minor, seeing you take it seriously builds trust and affection for your business. They’ll be more likely to stay and keep booking because they know you genuinely care about their experience. Plus, you’ll catch small issues before they become reasons someone might leave.

**10. Host Exclusive Client Events** – Throw an occasional “client appreciation” event or workshop just for existing clients. It could be a free yoga class in the park, a stress management webinar for therapy patients, or a small open house with refreshments and mini treatments for spa regulars. Invite them and maybe their friends (soft referral opportunity!).

Why: Exclusive events make your clients feel special and rewarded. It’s a way of giving back value beyond paid sessions, which keeps them enthusiastic about your services. These fun interactions re-energize clients’ commitment to you – and the fact they can bring a friend means you’re likely to snag a new client or two in the process.

**11. Provide Ongoing Education** – Keep educating your clients even after they’ve booked. For instance, send a monthly wellness newsletter with tips and a client spotlight, or share a YouTube video you made on a relevant topic. Tailor content to their interests (e.g., mental health tips for therapy clients, skincare routines for spa clients).

Why: When you keep adding value outside of appointments, clients stick around because they see you as a constant positive presence in their life.

They'll book more often and follow your advice. Plus, they may forward your awesome tips to friends, which indirectly brings you new clientele.

**12. Turn Clients into Stars (Testimonials)** – Feature your happy clients' stories (with permission) on your platforms. Share a before-and-after or a quote about how you helped them, maybe even a photo or video testimonial of them feeling great. Not only does this attract new clients, but it also flatters the featured client.

Why: Shining a spotlight on clients makes them feel appreciated – like part of your success story. The featured client becomes even more loyal (who doesn't like positive attention?), and others reading these stories feel inspired to book, envisioning their own success with you as the guide.

**13. Make Rebooking a Habit** – Train clients to think ahead. At checkout or in follow-up messages, always suggest, "Let's secure your next session now so you keep your progress going." You can even offer a small loyalty perk for booking a certain number of sessions in advance.

Why: Consistency gets results and clients know it. By prompting them to rebook while they're feeling the benefits of the latest session, you instill a routine. It's easier to maintain momentum than to restart; therefore, clients will keep coming regularly and your calendar stays nicely packed with returning appointments.

**14. VIP Early Access & Specials** – Give your existing clients first dibs on anything new – whether it's a new service, a limited workshop, or a discount offer. Shoot them an "exclusive early access" invite before you announce it publicly. They'll feel privileged and more likely to jump on it.

Why: People love feeling like insiders. By treating your current clients as VIPs, you increase their loyalty and lifetime value. They'll take advantage of the early offers (filling those slots) and appreciate you even more, which they'll express through their loyalty and referrals.

**15. Handle Complaints like Gold** – When an unhappy client surfaces, treat it as an opportunity to wow them. Listen actively, apologize sincerely, and over-correct if possible (like a free follow-up session on the house). Often a well-handled complaint turns a disgruntled person into your biggest fan.

Why: Mistakes or bad days happen, but your reaction can actually increase client loyalty. When people see you're committed to making things right, it builds deep trust. They'll not only continue booking, but they'll also tell others how well you care for your clients even when things aren't perfect – which is priceless publicity.

**16. Maintain a Spa-Like Atmosphere** – No matter your wellness niche, your space must be clean, comfortable, and inviting. Maybe it's calming music in the lobby, a cozy couch, or even a signature scent. If you're virtual, your on-screen background should be pleasant and professional.

Why: The experience matters. When clients feel relaxed and happy in your space, they associate those good vibes with your service. That means longer visits, more frequent returns, and enthusiastic reviews. People literally book with the place that gives them the best feeling, even if similar services are offered elsewhere.

**17. Empower Your Team to Wow** – If you have staff, give them the autonomy (and training) to go above and beyond. Could the front-desk person offer to walk an elderly client to their car with an umbrella on a rainy day? Can a trainer spend an extra few minutes after class to help someone with a form question? These little wows add up.

Why: A culture of exceptional service creates raving fans. Clients will share stories of how “the staff is amazing – they really take care of you!” This not only keeps those clients coming back, but it also sends their friends flocking to experience the same level of care, directly translating into more bookings.

**18. Make Referring Super Easy** – Beyond a formal program, simply facilitate the act of referring. It could be as simple as giving each client a

couple of business cards with a special new-client promo code on the back, or a “Share with a friend” forward option in your email. Also, positively reinforce when someone does refer (public thank-you or small gift).

Why: Happy clients might intend to refer but forget or don’t get around to it. By making the referral process frictionless and acknowledging it warmly, you’ll see a lot more names coming in as “so-and-so’s friend.” Each referral is essentially a pre-sold booking arriving at your door at no cost.

## 13 Ways to Automate

**1. Online Booking & Auto-Reminders** – Implement an online scheduling system that automatically sends confirmation and reminder texts/emails. Systems like Mindbody, Acuity, or Jane can handle this. No more phone tag – clients book themselves and get pinged, so they don’t forget.

Why: Automation here means fewer no-shows and less admin work. Your calendar stays full because people actually remember their appointments, and you free up time that you’d spend manually confirming bookings or chasing down late arrivals.

**2. Client Relationship Manager (CRM)** – Use a simple CRM or client database (even a spreadsheet to start) to track each lead and client, including their contact info, interests, and history with you. Set it to remind you when to follow up (e.g., it’s been six months since Jane’s last visit – send a “we miss you” note).

Why: A CRM ensures no one falls through the cracks. By keeping organized and automating reminders to reach out, you reactivate dormant clients and maintain a personal touch even as you grow. Consistent follow-ups result in a steady flow of returning bookings that you might have otherwise lost.

**3. Automated Email Nurture** – Create a welcome email series for new contacts or clients. For example, once someone signs up or comes in, they

get a sequence: Day 1 – welcome & what to expect, Day 3 – a helpful tip or blog post, Day 7 – an exclusive offer to book their next session. Set this up once and let it run.

Why: Staying in a new lead's or client's inbox keeps you top-of-mind effortlessly. Automation turns leads into bookings by building the relationship without you manually writing emails each time. By the end of the sequence, they feel connected and often have already scheduled their next appointment.

**4. SMS Marketing (Carefully)** – Use text messaging to your advantage by automating occasional texts: perhaps a monthly “wellness tip of the day” or flash sale announcement. Since text open rates are sky-high (around 98% are opened) it's an effective way to reach clients. Just don't overdo it – keep texts infrequent and valuable.

Why: People read texts almost instantly. A timely, well-crafted text can fill a sudden cancellation or boost sign-ups for an event because it creates a sense of direct, urgent communication. It's like having a hotline to your clients' attention – perfect for quick-action offers that fill your calendar.

**5. Social Media Scheduling** – Batch create your social posts and use a scheduling tool (like Buffer or Hootsuite) to publish them at optimal times. For instance, spend one afternoon designing a week's worth of posts. Automation tools (or built-in platform features) let you prepare and queue content ahead of time.

Why: Consistency on social media attracts and retains followers (future clients/patients) but doing it daily can be a drag. Automation maintains your marketing even when you're focused on clients. The constant visibility translates to more inquiries and bookings, without you being chained to your phone 24/7.

**6. Template Your Responses** – Save time by creating templates for emails/messages you send often. Inquiries about pricing? Have a friendly pre-written response ready to personalize. Follow-up after a consult?

Template it. Most email tools let you save snippets that you can insert and tweak.

Why: Speed and consistency. Instead of writing from scratch each time, a template lets you respond in seconds with all the key info, which impresses potential clients with your responsiveness. It also ensures you don't forget any important details. Quick, informative replies = more conversions to bookings.

**7. FAQ Chatbot** – Install a chatbot on your site or Facebook page that can answer common questions any time of day. For example, if someone asks, “What are your hours?” or “Do you offer group rates?”, the bot can instantly reply with the info you've pre-loaded.

Why: A chatbot is like having a 24/7 assistant. It engages visitors immediately, providing answers or even collecting their contact info for you. This instant interaction can capture leads who might otherwise bounce off the site if they can't find what they need at 11 p.m. – converting midnight web lurkers into tomorrow's appointments.

**8. Automate Review Requests** – Use software or an email trigger to automatically ask for a review a few days after an appointment. Many booking systems will send a “How was your visit? Please leave us a review here,” with a link. This automation enables you to continuously gather fresh testimonials without manually chasing everyone.

Why: Fresh reviews keep your reputation sparkling and improve your search ranking, which leads to more new clients. Automation provides every happy customer with a gentle prompt to share their experience, steadily increasing your social proof – and it takes zero extra effort from you.

**9. Recurring Tasks & Calendar** – Use project management tools (or just calendar reminders) to automate your marketing to-dos. For instance, set a recurring reminder to check your ad stats on the 1st of each month, or a task to send out the monthly newsletter on the 15th.

Why: Important tasks won't slip through the cracks. When marketing activities happen like clockwork, you maintain a steady pipeline of clients. With this organization, you'll consistently do the things that fill your calendar, rather than forgetting them in the chaos of daily operations.

**10. Segment and Personalize at Scale** – As your email list grows, use tags or segments to automatically send more relevant content. For example, tag clients by interest (weight loss, skincare, stress relief) and let your email platform send each segment tailored tips or offers. You can even have dynamic fields like <Client Name> and references to their last visit to make mass emails feel one-on-one.

Why: People pay more attention to messages that feel tailor-made. Segmented, personalized communication gets higher open rates and responses, which means more people taking you up on offers that genuinely fit them, resulting in more bookings without a one-size-fits-all blast.

**11. Outsource Routine Tasks** – Automate by delegation. Hire a virtual assistant or use a service for repetitive marketing tasks like posting blog articles, formatting newsletters, or sending appointment follow-ups. They can use your templates and guidelines to keep the tone consistent.

Why: Your time is precious. By offloading routine but important tasks, you'll guarantee they'll get done consistently while you focus on high-impact activities (or client care). The result? Nothing falls through the cracks, marketing stays steady, and your calendar reaps the benefits of continuous outreach multiplied by your helper's efforts.

**12. Analytics on Autopilot** – Set up simple dashboards or reports (e.g., Google Analytics for your site, social media insights, or a tool like Google Data Studio) that automatically update with key metrics – website visitors, lead form fills, booking rates, etc. Schedule a monthly email report to yourself.

Why: When data comes to you automatically, it's easy to stay informed. You can quickly spot what's working or needs tweaking and react appro-

privately to keep bookings flowing. No more guesswork – automated data means smarter decisions that lead to more filled slots with less effort.

**13. Repurpose Content Automatically** – Use tools or simple workflows to re-share your content across channels. Wrote a great blog post? Set up an automation to post an excerpt on Facebook and LinkedIn. Recorded a video tip? Extract the audio and queue it as a mini podcast episode.

Why: One piece of content can attract clients in multiple places without extra work each time. Automation allows you to squeeze maximum value (and reach) out of everything you create. The more eyes on your advice, the more inquiries and appointments roll in – all from content you already produced.

## 17 Ways to Scale

**1. Track Your Key Metrics** – Identify a handful of numbers that matter most (leads per month, conversion rate to bookings, client retention rate, etc.) and monitor them closely. By diving into these metrics, you can see what’s working, what to leverage, and what to let go of. Use a simple spreadsheet or dashboard to watch trends over time.

Why: You can’t scale what you don’t measure. Knowing your stats is like having a compass pointing you to where your time and money produce the best return in bookings. Doubling down on what works (and fixing or dropping what doesn’t) is the method for growing smarter and faster.

**2. Invest More in Winners** – When you see certain marketing efforts working (e.g., your Facebook ads are bringing 5X ROI or that partnership with the local salon brought 10 new clients), pour more fuel on the fire. Increase the ad budget, repeat the salon event regularly, etc. Scale up gradually and watch the results.

Why: This is how you move from a handful of bookings to a flood. By taking proven tactics and doing them bigger or more often, you amplify your success. It’s efficient growth, where every extra dollar or hour you

invest returns multiples in new appointments, because you're building on what's already proven to resonate.

**3. Trim the Dead Weight** – Conversely, if something isn't yielding results after a fair try, cut it. Maybe you sponsored an event and got zero clients, or you're posting on a social platform where your ideal audience isn't responding. Free up those resources and reallocate them to your winners.

Why: Your time and budget are finite. When you cease activities that don't pull in bookings, you create space (and funds) for those that do. This continuous pruning keeps your marketing effective and prevents you from throwing effort into a void – a critical strategy for sustainable growth.

**4. Expand Your Reach Geographically** – Once you're popular in your immediate area, consider casting a wider net. This effort could involve targeting ads to neighboring towns, listing your business in adjacent cities, or even opening a modest satellite location or pop-up day in a nearby town.

Why: If you've saturated one market, the next bookings bonanza might be just 20 miles away. By carefully extending your radius, you tap into new client pools. It's like replicating your success blueprint in a new territory, scaling your client base without reinventing the wheel.

**5. Introduce Scalable Offerings** – Add services that let you serve more people at once without proportional extra effort. For example, group workshops, small-group programs, or online courses/digital products (like a paid webinar series or an e-book of your top tips). A nutrition coach could sell a meal plan e-book; a therapist might host a weekly group session.

Why: One-to-one has a ceiling that one-to-many breaks through. Scalable offerings generate revenue and bookings beyond the hours you personally have in a day. They widen your funnel since many people's first paid interaction might be your group or digital product, before some will convert to high-value one-on-one bookings.

**6. Hire or Outsource Strategically** – Bring in help for the areas where you're hitting capacity. If your calendar is full (yay) but you still have demand, maybe it's time to hire another practitioner or instructor. If marketing is growing beyond your DIY skills, hire a part-time marketing specialist or agency to expand your efforts.

Why: Scaling often requires a team. More hands (when affordable) mean you can serve more clients and execute bigger marketing ideas. A new therapist can take on extra clients under your practice, doubling bookings. A marketing pro can drive campaigns that you couldn't manage alone, bringing in more leads. Investing in people pays off as your revenue grows beyond what a solo act could achieve.

**7. Systematize and Document** – Create SOPs (Standard Operating Procedures) for your successful processes – from handling consultation calls to running events. Use checklists or simple docs. This practice enables you to easily maintain the same quality and efficiency as you hire or expand.

Why: Consistency is critical to scaling gracefully. With all processes documented, you can onboard new staff faster, replicate events or campaigns without starting from scratch, and ensure clients get a positive, reliable experience no matter how busy you get. Growth won't break your system; it will continue to run like a well-oiled machine, keeping those bookings flowing smoothly.

**8. Scale Your Marketing Budget Wisely** – If you're getting a nice return on a small marketing spend, try upping it. For instance, if \$100 in Google ads brings 10 clients, see what \$300 does. You can also invest in higher-impact campaigns (like a professionally produced video or broader direct mail drop) once the basics are profitable. Track every dollar.

Why: At a certain point, investing more money yields significantly more bookings, but only when pointed in the right direction. When you reinvest a portion of your growing revenue into bigger marketing pushes, you create a cycle of growth. Basically, you pay to reach prospects who haven't heard of you yet, using proven messaging, and watch your appointment book fill up even further.

**9. Repeat and Expand Successful Events** – Take any event or campaign that worked well and scale it up. Got a great turnout at a free workshop? Next, offer a paid multi-week series or a larger seminar. Did a “Wellness Fair” open house bring in business? Make it a quarterly event or collaborate with more businesses for an even bigger expo.

Why: You’ve struck gold once – why not mine it again? People love continuity and bigger, better versions of things they enjoyed. By scaling an event, you not only bring back folks for round two (often with their friends), but you establish a tradition that becomes known in the community – meaning each iteration attracts more newcomers and yields more bookings than the last.

**10. Leverage Tech for Personalization at Scale** – Use advanced features in your software to tailor experiences as you grow larger. For instance, segment your newsletter by client type so fitness buffs get different content than skincare enthusiasts. Use your CRM to trigger personal birthday messages or one-year anniversary “we appreciate you” offers automatically.

Why: Big doesn’t have to feel impersonal. Tech allows you to keep that small-business charm (remembering birthdays, personal interests, etc.) even when you have hundreds of clients. This personal outreach fosters loyalty and referrals on a grander scale – clients stick around and keep booking because they still feel appreciated and recognized, which becomes a unique selling point as you expand.

**11. Consider a Second Location or Mobile Unit** – If your first location is consistently booked out and drawing from a broad area, you might scale by opening a second small location in another high-demand area or an adjacent town. Alternatively, launch a mobile service unit (like a pop-up clinic or van) that can visit different neighborhoods or corporate sites.

Why: Physical expansion can multiply your capacity and convenience. You’re effectively bringing your services closer to more people. For clients who found distance a barrier, you remove that obstacle – and voilà, a flood of new bookings. Plus, you spread brand dominance over a larger

geographic area, establishing you as *the* wellness provider in multiple communities.

**12. Double Down on Education & Content** – As you grow, invest in creating higher-quality content resources. Maybe start a YouTube channel or a podcast addressing common wellness questions or publish a short e-book of your best tips. Promote these widely.

Why: Thought leadership scales trust massively. High-quality content can reach thousands, positioning you as an authority well beyond your immediate locale. People often travel or wait to book with the perceived “expert” in the field. By scaling your content output, you attract a larger audience, many of whom convert to paying clients because they already learned from you and trust you.

**13. Implement Continuous Improvement Cycles** – Set aside time each quarter to review what’s working and brainstorm tweaks to improve it. Maybe your conversion rate is 50% – what would it take to make it 60%? Bring your team into these mini strategy sessions. Small iterative improvements (like a better follow-up script or a nicer welcome packet) implemented regularly consistently increase your effectiveness.

Why: Scaling isn’t just about doing more; it’s about doing *better*. Constant improvements act like compound interest in your business – each tweak could mean a few more bookings per month. Over time, these tweaks accumulate into significantly more revenue. You’re essentially squeezing more juice out of the same lemon – higher yield from the same efforts – which is smart growth.

**14. Collaborate with Industry Leaders** – As your reputation grows, seek out bigger collaborations. Co-host a webinar or retreat with another expert or brand in the wellness space (maybe from another city but with a similar audience). Or participate in a larger health summit or expo as a featured speaker/panelist.

Why: Partnering at a higher level exposes you to a whole new audience on a grand scale. It’s like referral marketing amplified – you tap into the trust

and following that another established entity has built. The credibility rubs off both ways, and you can get a surge of new clients who learned about you through these larger platforms, rapidly filling your appointment slots beyond your usual reach.

**15. Optimize for Efficiency** – As bookings grow, look for any bottlenecks in operations. Is paperwork taking too long? Maybe adopt electronic intake forms. Is scheduling back-and-forth eating time? Lean more on automated booking. Streamline processes like check-ins or payments (perhaps via an app or self-service kiosk).

Why: When you eliminate inefficiencies, you can handle more business with the same resources. A slicker operation allows you to serve more clients per day or give each client more attention without burning out. Efficiency prevents growth from overwhelming you – instead, it turns increased demand into a smoothly handled norm, keeping client satisfaction high and those bookings rolling in.

**16. Keep the Culture as You Scale** – If you expand your team, indoctrinate every new member in your “way of doing things” – the friendly vibe, the personal touches, the guerrilla mindset of always looking for creative marketing opportunities. Hold team meetings to share success stories and client feedback.

Why: A strong, consistent culture is your secret sauce. It’s what delighted your early clients and got you here. Preserving it ensures that even as you grow, clients will receive the same amazing experience that drives loyalty and referrals. New staff will carry the torch, meaning every client or patient, old or new, continues to praise and keep your calendar booked solid.

**17. Plan for Sustainable Growth** – Finally, create a simple marketing calendar each year. Mark out seasonal promotions, big campaigns, and review periods. Rotate through the strategies that work so none get stale (e.g., one quarter focus on a referral push, next quarter a big event, following quarter a content blitz, etc.).

Why: A well-thought-out plan prevents the feast-or-famine cycle. You'll always have something in the pipeline driving bookings. Sustainable growth is about consistency – by plotting it out, you avoid last-minute scrambles and maintain a continuous, energizing flow of new clients and returning fans, year-round.

# Chapter Ten

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## Avoiding The Most Common Marketing Pitfalls Before They Cost You Your Time, Money, or Sanity

If you've made it this far in the book, you're already ahead of the curve. So many wellness business owners I see never stop long enough to learn *why* their marketing feels hard. They stay stuck in reaction mode — trying one more thing, hiring one more agency, boosting one more post — hoping that eventually something will click. You didn't do that.

You slowed down and learned the system. You walked through the Salted Edge framework and mapped a 90-day plan instead of chasing a miracle tactic. And now, before we move into real-world case studies, I want to offer something invaluable by helping you avoid the traps that snare even the smartest, most capable practitioners.

Most marketing mistakes in wellness are not the result of carelessness or ignorance, but because you're competent, driven, and used to figuring things out. You've built a practice. You've managed staff. You've navigated regulations, insurance headaches, equipment purchases, and patient care. Naturally, when marketing feels confusing, your first thought is, "*I can*

*figure this out too.*” And sometimes you can. But without a system, that mindset can quietly cost you years of momentum.

Let’s talk about the most common pitfalls I see over and over again in med spas, wellness clinics, functional medicine practices, therapy centers, fitness studios, and integrative health businesses that are *poised for growth...* and how to avoid them before they become expensive lessons.

### **“I’ve Figured Everything Else Out—Why Not Marketing?”**

This one is subtle. And honestly? It comes from a good place. Many of the most frustrated practice owners I meet are also the most capable. You’re not afraid of learning. You’re resourceful. You’ve probably taught yourself more than you ever thought you would when you first opened your doors.

So, when marketing feels overwhelming, the instinct is to treat it like any other operational challenge, one you can educate yourself to overcome. It looks like reading, researching, signing up for online gurus, or watching what other (apparently) successful practice owners are doing. Yet before you realize it, marketing becomes a constant activity that never fully builds anything.

Here’s the problem: Marketing is not one skill. It’s a system of skills that only work when they’re connected. You can be great at writing social posts but have no conversion path. You can run ads but lack messaging clarity. You can have beautiful content but no follow-up system.

When you approach marketing as a collection of tasks instead of a system, you stay busy, but results stay inconsistent.

I’ve watched brilliant practitioners spend years tinkering with marketing, assuming that effort equals progress. And it’s painful, because the missing piece is almost never intelligence or motivation. It’s structure. How do you avoid this trap? Not by becoming a marketer but by trusting the order of operations.

That's why the Salted Edge framework exists. Attract, Convert, Create Raving Fans, Automate, Measure & Scale—in *that order*. When you resist the urge to jump ahead or “just try something,” you stop wasting time and start building momentum that compounds. Marketing works best when you decide *once* how things connect, instead of re-deciding every week.

## **Shiny Object Syndrome (or Reinventing Your Marketing Every Month)**

If marketing feels like an activity that requires constant reinvention to be successful, you may have fallen into what I call Shiny Object Syndrome. In practice, it often begins as excitement and enthusiasm but ends up as exhaustion. One month it's Instagram Reels. Next month it's SEO. Then someone tells you podcasts are the answer. Then a colleague swears paid ads changed everything. So you pivot. Again. And again. And again.

It's not sustainable; you certainly can't delegate marketing to your team when you do not have a system. Most of these tactics work. The issue is that none of them work in isolation or on a short timeline. You must come to terms with the idea that good marketing is a flywheel, not a slot machine.

Every time you abandon a tactic before it has time to mature, you reset your progress to zero. Your audience never gets familiar with your voice. Your content never compounds. Your data never becomes meaningful. And that leads to the most discouraging sentence I hear in wellness marketing: “We tried that, and it didn't work.” Usually what that person is really saying is, “We tried it briefly, without the supporting systems and consistency, and decided that marketing doesn't work.”

To avoid this trap, pick fewer things to put your energy into and commit to them longer. Work on consistency. Consistency builds trust, and relationships built on trust create successful businesses in the long term.

When you anchor your marketing in a system, you can try new tactics. The difference is, those tactics become experiments you can learn from, refine, and repeat. You're no longer chasing the next idea but strengthening the

engine you already built. Momentum comes from staying put long enough to let it build.

## **Seeking Omnipresence and Burning Yourself Out in the Process**

This is one of the most common and emotionally draining mistakes I see. There's an unspoken pressure in wellness marketing that dictates if you're not available everywhere, posting (at least) daily on every platform, if you're not more visible than your competitors, then clearly, you're falling behind.

The practitioners I've known with this mindset keep up for a while, but they're often posting at night and insisting that DMs must be answered hourly, while driving their teams crazy. They're brainstorming content on weekends and stressing if a post doesn't go out on schedule. Marketing stops feeling less like an extension of the mission and more like a second full-time job they never applied for. Burned out practitioners often tell me, "I love my clients. I love what I do. But I'm starting to resent marketing."

That's a sustainability problem. Omnipresence marketing works for teams with content departments and ad budgets. But for growth-stage wellness businesses with a ton of plates spinning already, it usually leads to burnout, inconsistency, and guilt. To avoid falling into this trap, you need to replace the idea of omnipresence with intentional presence.

Choose the platforms that align with how *you* communicate best. Build marketing systems that do not depend on your energy level that week. Let automation carry the weight of consistency so you don't have to. Marketing should support your life, not consume it. When you simplify, your message becomes clearer. When your position in the marketplace becomes clearer, you differentiate yourself and your content stands out. Effortlessly, trust develops faster. And trust, not frequency, fills your calendar.

## **When You Count the Win, But Disregard the Path That Led to It**

Of course, revenue matters. Dollars in the door keep the lights on, pay your team, and allow you to grow. But when revenue is the *only* number you're focusing on, marketing becomes an emotional roller coaster instead of a strategic system. I see this all the time: everyone celebrates when a practice has a great month, yet no one can pinpoint why it was great. Then a slower month rolls around, inducing sudden anxiety, second-guessing, and a scramble to "do more marketing," even though nothing is obviously broken.

Without insight, every marketing decision becomes reactive. You're left wondering whether it was that email, that post, that referral partner, or just good timing that brought people in. You don't know which message resonated, which campaign actually moved someone to book, or which channel deserves more of your attention. And when you don't have this critical information, every decision feels like guesswork. That's how practices end up overspending on things that don't work and pulling the plug too soon on things that do.

The good news? Avoiding this trap doesn't require complicated dashboards or hours of analysis. It simply requires shifting your focus. Instead of only measuring the outcome, you start paying attention to the journey. Where are people finding you? What are they engaging with before they book? What consistently shows up in the stories new clients tell when they say, "I've been following you for a while?"

When you begin tracking those touchpoints, even loosely, confidence replaces anxiety. You no longer react to every slow week and begin to recognize repeatable patterns. Measurement gives you the leverage you need to grow on purpose, with clarity and calmness.

## Concerning Leads, Seek *Qualified* Over Quantity

Let's talk about one of the most misunderstood and frustrating aspects of wellness marketing: leads. It's very easy to get swept up in the promise of volume with more leads, traffic, and clicks. These words appear to convey progress, especially when there are too many open spots on your calendar you're eager to fill. And on the surface, it makes sense: more people interested should mean more people booking, right?

Not always.

In the wellness space, more leads do not automatically equate to more growth, and in fact, can have the opposite effect on your business. A calendar full of unqualified consults creates friction, not momentum, as your team allocates precious time for people who either aren't ready, don't align with your pricing, or are not a good fit for the level of care you provide. Conversion rates and energy levels plummet. Confidence quietly takes a hit. And suddenly marketing feels like an uphill climb again.

I've seen practices double their inquiry volume and still feel completely stuck. From the outside, it looks like success, complete with ringing phones, filled out forms, and constant DMs. But behind the scenes, the generated leads do not match the services, expectations, or offered outcomes, due to a lack of clarity.

In this scenario, a small mindset shift makes a huge difference. Instead of optimizing for quantity, you optimize for clarity because clear messaging attracts the right people and educational content filters out the mismatches. An intentional conversion path sets expectations before someone ever books. And when it all works together, it creates marketing magic: you no longer waste time convincing, chasing, or re-explaining.

High-quality leads don't need to be sold because they enter your practice informed and ready for the next step. All they need is guidance. When you build your marketing to attract *those* people, growth becomes calmer, cleaner, and far more sustainable for you and your team.

## **When Technology Becomes the Plan (Instead of Supporting It)**

Technology can be an incredible accelerator for a growing wellness business *when it supports a well-devised plan*. Yet I see this pitfall all the time, especially when practices are ready to scale and eager to do things “the right way.”

A new tool promises automation. Another promises easier follow-up. Another promises growth without more effort. So, you invest. Then you invest again. Before you know it, you’re paying for multiple systems, logging into multiple dashboards, and still wondering why marketing feels harder than it should.

The problem usually isn’t the technology itself. It’s the hope that the tool *is* the strategy.

Without a clear marketing framework, even the best software turns into expensive clutter where systems don’t communicate and powerful features go unused. Your team isn’t sure what they’re responsible for or which tool to use for what. Adoption drops, frustration rises, and instead of feeling supported, everyone feels overwhelmed. I’ve heard more than one practice owner say, “We bought all this tech to save time... and now it feels like we’re managing the tech instead of the business.”

There is a simple, but powerful solution: strategy first, tools second. When you clearly define your goals in terms of attracting the right people, guiding them to book, nurturing long-term relationships, automating follow-up, and measuring what’s working, the right tools reveal themselves by simplifying your decisions.

As it grows, your marketing system should feel lighter. When you choose technology to support an explicit strategy, it fades into the background and quietly does its job. And that’s exactly the point. You want it to work *for* you, not demand more of your time, attention, or energy.

If you recognize yourself in any of these pitfalls, it means you were doing your best without a detailed map, which puts you in good company. Most wellness practices expand by figuring things out as they go, learning through trial and error, and paying a few “tuition fees” along the way.

Marketing chaos is not a character flaw, nor does it signify a lack of discipline, intelligence, or commitment. It’s the result of a systems gap you have the power to close *before* it costs you more time, money, or energy.

That’s the real opportunity. When you recognize these pitfalls ahead of time, you prevent yourself from hitting every wall and empower yourself to leap ahead. You get to identify the warning signs early, course-correct quickly, and move forward without shame, panic, or the need to start over. That alone can accelerate your growth by years.

In a nutshell, marketing requires alignment, intention, and a willingness to trust a process designed to support you. When you implement a system that works in harmony, marketing ceases to be a lonely uphill climb and becomes an engaged partner that quietly carries its share of the load.

# Chapter Eleven

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## Real Growth, Real Practices

Stories from the Salt Marketing Vault

**B**y the time you reach this chapter, I invite you to exhale just a little. If you've recognized yourself in the challenges, frustration, and inherent sense that your efforts do not match your growth, you're not alone. Most established med spa owners possess the skill, care, and commitment they need for success. Yet they struggle because they've outgrown their approach to marketing, often without realizing it.

The practices you're about to meet were not new, inexperienced, or floundering. They were respected in their communities and deeply committed to patient outcomes. They had exceptional teams and solid reputations. And yet, the weight of growth felt heavier than necessary.

Each of these stories represents a different moment in the same journey. When you read them together, they form a complete picture of actual growth — not in theory, but in the day-to-day reality of running a wellness practice.

### **When Visibility Lacks Momentum**

Dr. Jared Guichard and his wife Ashton built JAG Medical Spa in Summerville, South Carolina with intention. From the beginning, they focused on trust, results, and long-term relationships with the patients they served

across the Lowcountry. Over time, JAG grew into a multi-location practice with a strong reputation and a loyal following.

From the outside, things looked solid, but on the inside, growth started to feel complicated.

Social media demanded constant attention. Content required regular posting, but they didn't always understand why one post worked and another didn't. Although visibility existed, it felt fragile, as if it depended entirely on keeping the machine running at full speed. Despite the effort, growth had flattened, and the team could feel that something wasn't quite aligned.

Many med spa owners recognize this place immediately. You're visible, but not confident. You're doing all the things you're "supposed" to do, yet the return doesn't match the energy you're pouring in. Growth starts to feel unpredictable, and unpredictability creates stress.

As Ashton later shared, *"Before working with Salt Marketing, we were doing well but knew we had untapped potential."* That sense of being close but not quite there was the signal that JAG had outgrown a fragmented approach to marketing.

What changed? A shift in how visibility fit into the bigger picture. Instead of the primary driver of growth, social media became what it was always meant to be: one supportive layer within a larger, intentional system. Content no longer existed in isolation, messaging became clearer, and each effort reinforced the next.

As the pressure lifted, momentum returned in steady progress as new patients began finding JAG more consistently. The brand felt recognizable rather than reactive, and expansion now felt sustainable.

How did Dr. Jared feel about this new marketing strategy? *"Partnering with Salt Marketing has been one of the best business decisions we've made. Their personalized approach helped us grow faster and more effectively than we ever imagined."*

Instead of shouting louder, visibility got smarter. And for JAG Medical Spa, it made all the difference.

## **When Being Found Finally Leads to Being Booked**

Foundation Health & Wellness in Albuquerque, New Mexico tells the next part of the story. Jalayne Faulhaber, CNP, MEP-C built her practice around thoughtful care and long-term patient outcomes. In the first year of business, however, growth was modest. The practice booked roughly 35 appointments total. Word-of-mouth helped, but visibility was limited.

The situation didn't improve much in years two and three. Although the practice wasn't declining, it wasn't growing either. People were finding Foundation online, but booking simply wasn't happening at the rate it should have been. Interest existed, yet decisions stalled.

That realization marked a turning point. The question shifted from *How do we get more people to see us?* to *What happens once someone does?*

Conversion was the issue.

With a website designed to guide people rather than overwhelm them, the experience began to change. Visitors no longer had to piece things together on their own. Questions were answered naturally. The next steps were clear. Booking felt less like a leap of faith and more like the obvious continuation of the conversation.

In year four, Foundation doubled its number of booked appointments, about half of which came directly from the website. Then, in 2025, the practice doubled its number of appointments again entirely through organic leads, without paid advertising.

The reassuring numbers behind the growth are worth lingering on. Over the course of 2025, Foundation averaged about 2,000 search impressions per month. From those impressions, roughly 250 unique visitors arrived at the website. Of those, around seventy-eight clicked with clear intent, and an average of 42 booked appointments followed.

That progression tells a powerful story: growing a med spa does not require massive traffic. It needs clarity, alignment, and a system that respects how real people make decisions.

Jalayne put it simply: *“Working with Jennifer and her team has been a game-changer for our business. From day one, they delivered real, measurable results.”*

For Foundation Health & Wellness, growth was the natural outcome of making the path forward easier.

## **The Experience That Turns Patients into Advocates**

Although attraction and booking are important, they're only part of the story. What happens after someone says yes often determines whether growth lasts.

At JAG, clearer messaging and consistent visibility resulted in patients arriving already familiar with the brand. Trust had been built before the first appointment, and that familiarity facilitated easier conversations and deeper relationships.

At UltraWellness Medical in O'Fallon, Missouri, Dr. Michael Williams saw this dynamic from a different angle. Patients were interested and asking questions, but the journey beyond that first interaction wasn't always obvious because follow-up varied and communication was not always relevant to what patients had expressed interest in. Consequently, opportunities slipped away.

Once the practice clarified the patient journey, the experience became cohesive, with timely and relevant communication that made patients feel understood rather than processed. The care extended beyond the exam room, reinforcing trust and loyalty over time.

This is how you create raving fans, through intentional consistency.

## **Systems That Protect What Matters Most**

For UltraWellness, one of the most meaningful shifts came from removing friction in follow-up and communication. Practices often perceive automation as impersonal, but when done thoughtfully, it creates a personal touch by ensuring no one is forgotten. Automation reflects intent and supports care.

By personalizing communication based on expressed interest, UltraWellness strengthened relationships, improved booking rates, and increased lifetime value without adding stress to the team. The systems actually protected the human side of the practice.

## **When Growth Becomes Predictable**

This is where all three stories converge.

Before structured support, JAG's patient growth was steady but flat. In 2021, the practice added 730 new patients. In 2022, that number remained nearly identical. Growth was neither declining, nor accelerating.

After structured marketing support began in August of 2023, new patient additions rose to 964, a thirty-three percent increase year over year. In 2024, JAG added 1,068 new patients. In 2025, that number climbed again to 1,282.

While the increase matters, it's the natural byproduct of all-important consistency. With consistency, growth became predictable, planning became easier, and decision-making flowed from confidence rather than guesswork.

Foundation experienced the same sense of stability. Booking became steady as visibility translated into action. UltraWellness saw stronger relationships and improved long-term value without sacrificing experience or care.

As Ashton Guichard reflected, *“Every result is backed by real data—and every campaign feels custom.”*

## **The (Marketing) Moral of These Stories**

At their core, these stories are about relief from guesswork, constant unrewarded effort, and hustling harder to ignite growth. Each of these practices cared deeply about their patients long before they implemented strategic systems. While their values remained the same, the support around them changed.

If you see yourself in these stories, know that you’re not behind, and you’re not failing. You’re simply ready for marketing to feel as intentional as the care you provide. And that is exactly where real, sustainable growth begins.

# Chapter Twelve

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## Love Your Business Again

When most people decide to open a med spa, they are not chasing marketing tactics or dreaming about analytics dashboards. They are thinking about the kind of care they want to provide, the outcomes they want their patients to experience, and the freedom they hope to create for themselves and their families. The business should support that vision, not compete with it. And yet, for many med spa owners, there comes a point when the business starts to feel heavier than it should, when the joy that once fueled it slowly recedes to pressure, second-guessing, and a constant sense that they have a finite amount of energy to devote to managing more than they anticipated.

If that sounds familiar, it's because growing a med spa in today's environment is genuinely complex. In a crowded marketplace, filled with more informed and cautious patients, you're competing with fragmented attention across platforms that didn't even exist when many practices opened their doors. Simultaneously, you're still expected to show up as a clinician, a leader, a culture builder, and a business owner — often all on the same day. Marketing insidiously becomes one more responsibility added to an already full plate, and without realizing it, something that once felt optional begins to feel overwhelming.

What makes this especially frustrating is that most med spa owners make the effort. In fact, a lack of effort is rarely the problem. You've posted. You've tried different strategies. You've listened to advice. You've invested

time, money, and attention into “doing marketing,” even when it didn’t come naturally or comfortably. The issue is that no one taught you how all of this is supposed to work together.

That’s why I wrote this book.

Everything you’ve read up to this point has been building toward a simple but powerful realization: marketing is not a collection of tasks to keep up with, nor is it something you should have to carry on your own. When you treat marketing as a system — one that reflects how real people make decisions, builds trust over time, and supports the care you already provide — it becomes an invaluable asset.

In the StoryBrand sense, this is the moment where you, the reader, step fully into the role of the hero because you now understand the problem clearly and have a plan to move forward with confidence. You can see that the challenge wasn’t that marketing “didn’t work,” but that it was fragmented, reactive, and disconnected from the way your business actually operates. You were trying to grow without a system designed to support growth.

Throughout this book, we’ve talked about what it really means to be found by the right people by showing up consistently and clearly in the places where your future patients are already looking. We’ve explored why being found is only the beginning, and how conversion happens when you remove confusion, make the next steps obvious, and create messaging that respects the emotional weight of health-related decisions. We’ve looked at what it takes to create experiences that turn first-time patients into long-term advocates, and how systems can protect relationships rather than replace them. We’ve also talked about measurement not as a tool for self-judgment, but for gaining the clarity you need to remove the guesswork from growth. Taken together, these ideas go beyond the formation of a strategy to the development of a business operating system that allows you to lead instead of react.

This is often the moment when people feel excitement *and* hesitation. Excitement, because the path forward finally makes sense. Hesitation,

because change — even good change — can feel daunting when you're already busy. It's important to pause here and understand unambiguously what I am and am not asking you to do. I am not asking you to overhaul everything overnight. I am not asking you to chase perfection or suddenly become a marketing expert. What I am encouraging you to do is commit to consistent, focused action — the kind that compounds quietly over time.

Real growth results from doing fewer things with intention. Choosing one place to show up consistently instead of trying to be everywhere. Clarifying one core message before adding new ones. Improving one part of the patient journey that feels confusing or inefficient. Putting one system in place that protects your time or strengthens your follow-up. While not dramatic, these meaningful moves generate momentum without burning you out.

It's also worth being honest about what happens when marketing remains reactive and unsupported. Without a system, growth tends to feel fragile and elusive. You're always chasing the next idea, platform, and recommendation. Progress depends heavily on your personal energy and attention, which means the business can only grow as far as you can push it. Over time, that kind of pressure leads to exhaustion, frustration, and a quiet resentment toward a business you once felt proud of building. It's not a personal shortcoming but a predictable outcome of trying to grow without structure.

You have already seen the alternative reflected in the stories throughout this book: a business where marketing works in the background, your team understands what matters and why, and decision-making flows from clarity instead of urgency. It's a practice where growth feels steady instead of chaotic, and your role shifts from constantly managing details to leading with confidence.

When marketing becomes a system, you regain something that often gets lost along the way: space. Space to think strategically. Space to focus on patient care. Space to remember why you built this business in the first place. You don't stop working hard, but the work now feels aligned instead

of scattered. The business that once competed with your life now supports it.

If there's one thing I hope you take away from this final chapter, it's this: you are not behind, and you are not broken. You've been doing your best without a detailed map, and now you have one. The next chapter of your story depends on applying what you've learned with patience, intention, and trust in the process.

If you do that, it's very possible that one day you'll look back on this moment and recognize it for what it was — the point where things finally began to feel right again. Where marketing stopped feeling like a constant uphill climb and started feeling like a supportive partner in growth. Where you didn't just build a successful med spa, but rediscovered what it means to love running it.

That is the kind of success worth building toward. So, as we say on the Worth Your Salt podcast, let's get out there and shake things up!

### **Ready to shake things up even further?**

If you'd like to partner with Salt Marketing to *Get Found, Get Booked* and scale your impact with a marketing system that finally works, please consider the following options.

Join The Salted Edge



Get a complete wellness marketing system running in 30 days, even if you hate tech or don't know where to start. Get the strategy, tools, and support to finally attract new clients, keep them engaged and grow your practice

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Once you request your report, you'll be prompted to schedule your FREE Discovery Call to understand your OPI and discover how Salt Marketing can help you grow your med spa or wellness practice with a message that converts and systems & strategy that scale.

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To my sister, who has always taken the path less traveled. Thank you for inspiring me by always being true to yourself.

Thank you all for the countless years of listening to me excitedly explain marketing systems at the dinner table, in the car, and sometimes long past when you were ready to hear one more thing about messaging, automation, or client journeys. Thank you for believing in me when the idea felt bigger than I did. Your patience, encouragement, and steady love are the foundation beneath every page.

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To the guests of the “Worth Your Salt” podcast — thank you for sharing your wisdom generously. Your stories, hard-earned lessons, and honest conversations have shaped not only this book but my thinking as a leader and entrepreneur. Plus, our podcast has been an incredible source of inspiration for so many listeners over the years, and that would not have been possible without your contributions.

To Salt Marketing’s clients — thank you for trusting us with your businesses, your dreams, and even your frustrations. You allowed us behind the scenes and gave us the space to roll up our sleeves and make a real difference. That willingness and your courage to grow is the reason this book exists.

To my editor, Daria Anne DiGiovanni: This book would not exist without your endless patience with me adding “just one more resource” and helping me organize my enthusiasm into a workable playbook. Thank you for your encouragement, level-headedness and experience.

And finally, to every wellness practitioner who has ever wondered, “Why does marketing feel so hard?” — this book is for you. May it give you clarity where there was confusion, structure where there was chaos, and renewed confidence in the business you worked so hard to build. I want you to know that without a doubt, you can do this. Wishing you all the best.

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## About the Author



Jennifer Orechwa is the founder and CEO of Salt Marketing, a top marketing agency that helps med spas and wellness practitioners attract ideal clients, streamline their marketing, and scale with confidence. With nearly three decades of marketing experience — and a proven record of helping wellness businesses double their leads and boost client retention — Jennifer has become a trusted authority for practitioners who want

to grow without relying on short-term tactics or endless ad spend.

As a StoryBrand Certified Coach, speaker, and guest writer for top wellness and marketing publications, Jennifer has guided hundreds of practitioners to clarify their message, implement powerful automation systems, and build lasting brands rooted in trust. She also hosts the popular *Worth Your Salt* podcast, where she shares the stories and strategies redefining success in wellness.

Before launching Salt Marketing, Jennifer and her husband built and exited a multi-seven-figure business, twice named to the Inc. 5000 list of fastest-growing companies. Her expertise blends data-driven strategy with storytelling that connects deeply with clients — helping practitioners transform from overwhelmed business owners into confident leaders of thriving, purpose-driven practices.

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Jennifer lives just outside of Charleston, South Carolina with her husband Walter and their Shiba Inu, Maverick. She enjoys running, reading, all things business and marketing and spending time with family, friends and clients who feel like family and friends!

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