



salt marketing

Social Selling Mini-Retreat Workbook

*From Scrolling to Booking: Mastering Social
Selling for Wellness Practitioners*

Dear Wellness Practitioners,

First, let me say how thrilled I am that you're here. Whether you're joining us with a solid social media strategy or feeling like it's "a hot mess you don't want to talk about," this retreat is for you. Today, we're going to transform the way you think about social media—not as a burden, but as a powerful tool to connect with the people who need your help the most.

I know what you might be thinking: "I don't want to live on social media." Here's the good news—you won't have to! This isn't about spending endless hours scrolling or posting without purpose. It's about creating intentional, authentic content that speaks directly to your ideal clients and inspires them to take action. Together, we'll break through the noise, get clear on your vision, and map out a plan that feels as good as it works.

By the end of our time together, you'll have the tools to:

- Clarify your vision: Picture what it would look like to sell consistently and confidently through your social platforms.
- Understand your audience: Get into their heads, their hearts, and their lives so you can meet them exactly where they are.
- Build a system: Walk away with a customized, easy-to-follow plan that turns social media from a chore into one of your best business assets.

We'll explore storytelling, discover the secret to authenticity, and learn how to guide your audience toward transformation. You'll see how to position yourself as the go-to expert, all while staying true to you.

If you're ready to stop spinning your wheels and start seeing real results from your posts, you're in the right place. Social selling isn't just about likes and followers—it's about connection, trust, and creating impact.

So, grab your favorite pen, get comfortable, and let's dive in. This workbook is your roadmap, and I'll be here every step of the way to guide and cheer you on.

You're going to do amazing things—not just on social media, but in the lives of the people you're meant to help. Let's get started!

Warmly,



P.S. Remember, social selling doesn't have to feel overwhelming. You've already taken the first step by being here, and that's something to celebrate!

**BOOK A STRATEGY
SESSION**

PILLAR I: YOUR VISION

What do you want your social media presence to look like?

What is happening? Where are you showing up?

How often are you posting? What are the results of that schedule?

What are you responsible for? Do you have help? Do you do it yourself?

How do you know you're successful?

Define success - what does it look like to you?

Write your Vision Statement

Additional notes:

PILLAR II: YOUR PEOPLE

Key Levels of Understanding Your Audience:

Superficial Understanding:

Basic demographics and pain points

Mirrored Understanding:

Reflect their thoughts, fears, and desires in your messaging

Synced Understanding:

Anticipate needs and create content that feels personalized and intuitive

How to Message Mine:

Find 5+ people who you think are your ideal customer:

- 1.
- 2.
- 3.
- 4.
- 5.

Invite them to a video call (Min. 45 minutes)

Record the call. Ask these questions:

- Is there anything you find annoying about [what you do/specialize in]?
- What would change your [scenario] if [achieve transformation]?
- What stresses you out about [what you specialize in]?
- What questions constantly pop up for you? What do you want to ask?

Use your transcription of the call to:

- Print and highlight desires & challenges
- Group into themes

VOILA! Use challenges as content.

Create your “Ideal Client Snapshot”

Thinking of this person helps us communicate more clearly in our posts and really connect with the people that we can help. So identify that person’s pain points, goals, and what’s holding them back

Additional notes:

OUR SOCIAL SELLING SYSTEM:

1. Write articles on relevant topics and publish them on your website's blog.
2. Use AI tools (like ChatGPT) to generate 2-3 social posts based on each article.
3. Publish posts with a clear call-to-action (CTA) on your practice's social profiles daily, Monday–Friday. Share your favorite or best-performing posts on your personal profile over the weekend with a direct invitation to book.
4. Respond to all DMs promptly and authentically to build trust and connection.
5. Have your team follow up personally on DMs to invite prospects to book an appointment.
6. Add prospects to your CRM to track their interactions and interest.
7. Follow up and nurture them with personalized automation sequences tailored to their specific interests and needs.

Create your Social Selling System:

Draft an easy to follow system to ensure your social media efforts are consistently driving engagement, building relationships, and converting prospects into clients.

PILLAR III: YOUR ACTION PLAN

Planning Types:

Organic

Planned

Organically Planned

Content Types:

Personal Stories

Personal Opinion

Invitations or Offers

Training

Challenges/Pain Points

Testimonials

Personal Lifestyle

Social selling is just about creating movement in the business. Let's first talk about what success looks like:

Define success:

If I sell directly off of a link, what will I need to ensure is done?

If I create a connection and someone sends me a DM, what will I need to do or make sure is done?

If I build interest, what will make me feel successful?

Where do I fall on the messaging levels? How can I be more connected and synced to my people?

How do I want to work over the next 30 days?

When am I going to write my content? When am I going to post it? How many am I going to write at one time?

Additional notes:

CLIENT CASE STORY EXAMPLE

HEADLINE

From Burnout to Scale: How a Functional Medicine Practitioner Launched a Revenue-Generating Gut Health Course

WHY DID THEY COME TO YOU? WHAT WERE THEIR CHALLENGES/WORRIES?

This functional medicine practitioner had a thriving practice but was overwhelmed by the limitations of trading her time for money. Her days were fully booked, leaving her little time to pursue new opportunities or develop other revenue streams. She worried that her income potential was capped and that her vision for helping more patients was being stifled by the constraints of her one-on-one approach. Additionally, she wanted to avoid the complex and time-consuming process of building an online course and marketing it successfully.

WHAT WAS THE BIG UNDERLYING ISSUE?

The core issue was scalability. While her practice was successful, it relied entirely on her availability and direct patient interactions. She lacked a system that could generate revenue independent of her time. She also needed a streamlined way to reach a wider audience and establish herself as an authority in functional medicine beyond her local community. The absence of a clear, actionable plan to build and promote an online course added to her hesitations.

WHAT WAS THE FIRST THING YOU DID?

We started by sitting down with her to understand her goals and vision for the online gut health course. Together, we developed a launch strategy centered around a webinar, designed to introduce the course and attract both her existing patients and a new audience. We outlined the necessary technology and resources, including a membership platform, course software, and email automations. This gave her clarity and confidence in the process and ensured every piece of the project aligned with her vision.

WHAT HAPPENED NEXT?

With a clear plan in place, we built a new website tailored to her practice, incorporating a membership platform and user-friendly course software. We created an automated email campaign to nurture her existing patient list and introduced her course through engaging and informative messages. To expand her reach, we implemented a social media strategy that included organic posts and collaborations with influencers in the wellness space. Throughout the process, we provided coaching on promoting her course through webinars and podcasts, empowering her to confidently market her offering.

WHAT DID THIS ACHIEVE? EITHER TANGIBLE OR INTANGIBLE?

The results were transformative. She launched her course to an enthusiastic audience, with patients and new leads signing up for her program. Her reach grew significantly thanks to collaborations with social media influencers, while her webinars and podcast appearances positioned her as a thought leader in the gut health space. Beyond financial gains, she gained invaluable skills and insights into leveraging modern marketing strategies to scale her practice. Most importantly, she found a way to generate revenue at scale while helping more people than ever before.

HOW CAN SOMEONE WORK WITH YOU? WHAT'S THE OFFER?

If you're ready to scale your practice and reach more people without adding hours to your day, our Growth Accelerator Program is for you. This six-month, fully inclusive inbound marketing program is designed specifically for health and wellness practitioners. We'll tap into your expertise and create an organic lead-generation flywheel that includes:

- *StoryBrand messaging tailored to your unique practice*
- *A fully optimized website and SEO strategy to attract ideal clients*
- *CRM and automation systems to nurture and convert leads*
- *Original content designed to answer the questions your audience is asking*

With the Growth Accelerator, you'll have everything you need to build a scalable marketing system that works for you.

CALL TO ACTION

Ready to transform your practice and achieve sustainable growth? Let's talk! Book a free consultation today to see how the Growth Accelerator can work for you. Schedule Your Call Now and take the first step toward scaling your practice and your impact.

CLIENT CASE STORY WORKSHEET

Who are you going to highlight? What did they achieve?

What challenges did they face? What were they worried about?
Why did they come to you?

What was the big underlying issue that you noticed with this client/patient? What were they feeling?

What kind of results did they want?

What was the first thing that you did with them? What kind of result did that one thing achieve?

What happened next? Once that first goal was achieved, what did you move onto?

What kind of results did you achieve with them (both tangible and intangible)?

How can someone new work with you? What are you offering? What kind of results can they hope to achieve?

| What's included in that offer? And how can they get in touch?

| *Additional notes:*

WHY YOU?

What is my innate “Genius Zone?”

What do I want to highlight about me and my work?

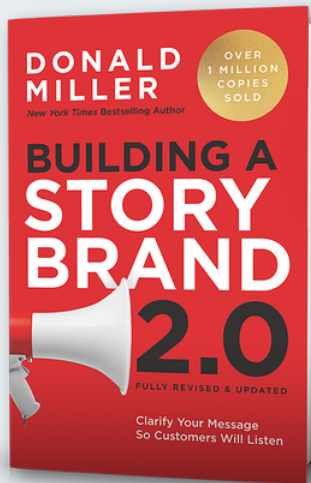
What do I want to be recognized for?

What do people come to me for and ask me for advice on?

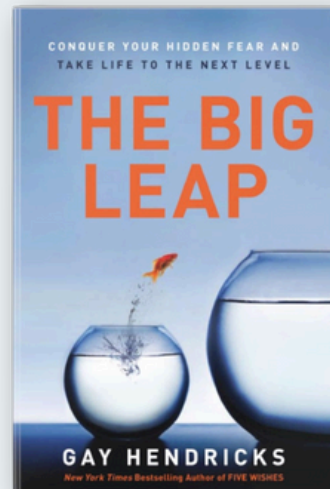
POSTING NON-NEGOTIABLES CHECKLIST

- ☐ Always include a call to action
- ☐ Be authentic
- ☐ Be consistent
- ☐ Tell a story
- ☐ Use visuals

RECOMMENDED TOOLS & RESOURCES



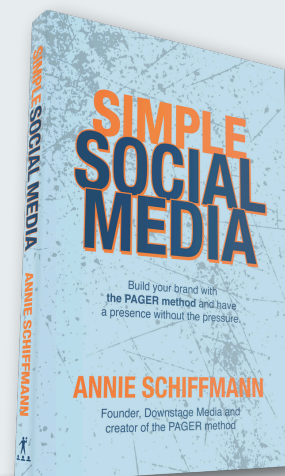
Building a Story Brand 2.0
by Donald Miller



The Big Leap
by Gay Hendricks

keap

Keap:
World Class Email
Marketing, CRM, and
General Life Organizer



Simple Social Media
by Annie Schiffman

READY TO GET STARTED?

Congratulations on taking the first step toward creating impactful and engaging social media content! With these prompts, ideas, and tips, you're well on your way to building a consistent online presence that connects with your audience.

If you'd like more personalized support to elevate your social media strategy or need a trusted partner to handle the heavy lifting for you, the team at Salt Marketing is here to help. Let's work together to craft a social media approach that drives growth and delivers results. Reach out to us today—we'd love to be part of your journey!

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