

Synergistic Systems

By Kay L. Cross, MEd

Wanted: Experienced Business/Life Manager

Becoming a great self-manager takes practice and consistent discipline.

How much fun did you have last month? Did you throw away what you didn't need, and get organized and motivated for a year of synergy? Now that the cleaning out and filing are behind you, we're on to the next step—the search for a great business manager. Since that most likely will be *you*, get prepared to work on yourself this month. Self-management requires discipline, and discipline is a process, not a crisis. Your fitness business will follow the same successful management path you do.

In my early years as a personal trainer, I focused on cramming my work hours with as many clients as possible. It's no mystery why I spent the weekends and nights doing bills and paperwork. I felt as if I worked all the time, and it turns out I did! During the 2 years I was training to become a professional coach, I learned a formula for dividing my work hours. To spare you the years of all work and no planning, we will use the following breakdowns, focusing on client hours, business administration, and business development and planning.

Client Hours: 70%

Some of you are already in shock. Yes, if you intend to work a 40-hour week (which we will presume for this article), only 70% of those hours should be actual paid client hours. This is the same for all types of clients: personal training, coaching, speaking, group fitness or massage. Those 28 hours should be focused, service-devoted and well-

planned. We will cover client needs in detail in the next two issues. In the meantime, keep in mind that you need to do some thinking and planning on the following:

- * total work hours desired per month
- * total client hours needed
- * fee needed for desired income
- * frequency of fee increases

Business Administration: 20%

This is the critical area for staying caught up and ready for another week of work. If you get behind here, you lose your professional edge, which eventually costs you business. This is one of two time categories that allow you to work *on* your business, not just *in* it. These priceless hours let you step back, evaluate and do some creative thinking while you take care of the details of running your business. If you have trouble keeping yourself organized, seek help!

Business administration should consume about 8 hours of your workweek. Plan these hours as you would any other appointments. You probably know by now which days are most fruitful for office work.

Here are some activities to include in this area:

Earning and Tracking Continuing Education Credits (CECs)

- * Go through your new "Continuing Education" file and choose conferences or workshops you would like to attend to satisfy your CEC needs. Evaluate each event, based not only

on the presenters and content, but also on the CECs you'll get for the money. Figure the "cost" per CEC as well as the number of credits.

- * Enter possible conferences and workshops in your day planner. Don't forget the early-bird registration dates.
- * If you like earning CECs through approved articles and quizzes, attach a sticky note to the front of each issue that offers a test you need to complete, and jot the due date on the note.
- * If you currently track and enter CEC due dates for each certification, improve that system by marking a pre-due-date reminder 6 months ahead. For example, if you have an American College of Sports Medicine certification with CECs due in December, put a reminder in June.
- * Copy the CEC forms you need to mail, and put them in your "Continuing Education" file so they are ready when you need them.

Updating and Upgrading Your Computer, Equipment and Promotional Materials

- * If you enter client data in your computer every day or each week, routinely back up your hard drive.
- * Review your materials and equipment needs every 6 months to ensure you have what you need to make your job easier.

Bill Paying and Budgeting

- * Pick one day each week or month when you will pay business-related bills.
- * Review your business budget every 6 months, and make adjustments where needed.

Tax Preparation and Organization

Tax time is a piece of cake if you have been organizing all year long.

- * Use a multitable folder to file your receipts each week.
- * Record on each receipt which heading it goes under (for cat-

egory ideas, see “Face Your Finances” in the April 2005 issue of *IDEA Trainer Success*).

Client Billing

- * new client inquiry and follow-up*
- * client forms*
- * program design*
- * client feedback and reports*
- * client education*
- * client correspondence*

*We will cover these topics in detail in the next two issues.

Business Development and Planning: 10%

Ten percent of your work hours sounds so inconsequential, but can you imagine how much dreaming, planning and strategizing you can accomplish in just 4 hours per week? A ton! Pick an ideal time that allows you to get away from your office to do some real thinking and planning *on* your business. Wear your business- and life-manager hat, and get feedback from close friends on dreams and proposed strategies.

There are several areas you could focus on in this category, but these are the ones I have found critical:

- * business goals
- * personal goals
- * marketing and referral generation

Purchase a notebook you can carry with you anywhere, and log your business ideas and dreams. Write down everything that comes to mind. I still have the piece of notepaper on which I recorded my first business goal: to start a personal training business by the age of 25. I surpassed that written goal! I started my business at the age of 23 and went full-time at age 25. Begin with goals for the next year, and then break them down into month-by-month steps. When I wrote and published my first book, *The Body Bible*, I worked my goals backward. By starting with the target delivery-to-clients date, I set monthly goals that helped me get to the desired end product. You can accomplish anything if you break goals into small, well-planned steps.

Take personal goals into account

when working on your business. Most important, plan your own workout time and restoration into the week. Write yourself in as a client, and cherish this time for yourself.

A marketing and referral-generation plan is critical to the success and longevity of your business. During your planning hours, come up with a simple, regular marketing plan. Do the same for referral generation from current clients or contacts. Re-evaluate your method after 6 months to see where adjustments are needed. Be consistent, and take action every month.

Position Filled

Create and maintain synergy in business by having a plan. Fill the shoes of an experienced business manager by using your time and efforts wisely. Successful administration and healthy growth depend on the hours you spend stepping outside of your primary duties and into your role as a life or business manager. It is time to work on your goals and plans for the future. The challenge for most of us lies in prioritizing quiet time to think—no television, radio or ringing phones; just a little comforting background noise for company. So grab your new notebook, put on your manager hat and run for the hills!

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WHAT'S IN MY DAY PLANNER?

- 70% of hours allocated for paid client time
- 20% of hours allocated for business administration
- 10% of hours allocated for business development and planning
- due dates for CECs
- pre-due-date reminders for CECs (6 months in advance)
- possible conference and early-bird registration dates
- “upgrade and update review” month, with a follow-up 6 months later
- data backup days
- bill-paying day each month
- two budget review days for the year
- weekly workout dates
- restoration and vacation days (as many as you can!)
- monthly marketing
- monthly referral generation and follow-up
- marketing and referral-generation review every 6 months

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