

Module 1 Storyboard

Slide 1: Title Slide

Text: Business Foundations for Health & Wellness Professionals

Visual: Terraform Consulting Logo

Interactions: Start button with "Let's Get Started" Text

Slide 2: Setting the Context

Character: Woman in scrubs

OST: "I'm a mobile massage therapist ready to operate."

Interactions:

Button 1= Rectangle + Text "All I need is Cash App & Text Messages" links to Setting the Context Incorrect slide

Button 2= Rectangle + Text "I need my qualifications & business readiness"

Slide 3: Setting the Context Correct Incorrect Answer

OST: If all you use is cash app & text messages, you may not be prepared for all the challenges & opportunities that come with running a business

Interactions: Rectangle + Text "Try Again" links back to "Setting the Context" Slide

Slide 4: Setting the Context Correct Answer

OST: Health and wellness professionals should have two things in place: proof they are qualified to deliver their service and the business systems needed to deliver that service professionally.

Interactions: Rectangle + Text "Let's Learn More" links to "Objectives" Slide

Slide 3: Introduction

Title: Difference Between Being Licensed/Certified and Being Business-Ready

Visuals/Media: Video with a bridge, difference between being licensed/certified and being business ready

Text:

Voiceover Script(Captions/Subtitles): Health and wellness professionals should have two things in place: proof they are qualified to deliver their service, and the business systems needed to deliver that service professionally.

Slide 5: Objectives

OST:

Objectives

By the end of the Module, the professional will be able to:

- identify foundational business gaps
- develop a basic business structure and service delivery workflow

Interactions: Arrow + Text "Continue" links to "Basic Business Structure & Service Delivery Workflow" title slide

Slide 6: Basic Business Structure & Service Delivery Workflow

Interactions: Arrow + Text "Continue" links to "Business Structure" slide

Slide 7:

Title: Business Structure

OST: Health and wellness professionals should put the following in place:

- a legal business structure such as sole proprietorship or LLC
- business registration with state/local agencies
- EIN if needed
- separate business bank account
- bookkeeping process
- business insurance
- contracts and policies
- a dedicated business email and phone process

Interaction: Arrow + Text "Continue" links to "Service Delivery Workflow" slide

Slide 8:

Title: Service Delivery Workflow

OST: A standard workflow should be put in place from first inquiry through follow-up.

Recommended workflow:

Interactions: Arrow buttons individually programmed

Slide 9: Example

Scenario: A wellness consultant should not move from "DM me for details" straight to a Zoom session. The business should first screen the lead, send intake paperwork, confirm payment, send reminders, conduct the session, document notes, and follow up with next steps.

Slide 10: Branding vs Operations

Slide 11:

OST: (2 side by side lists)

Branding (in bold)

Branding elements that should be in place:

- business name
- logo
- brand colors/fonts
- basic website or landing page
- clear service descriptions
- niche message
- consistent social media presence

Operations (in bold)

Operational systems that should be in place:

- online booking
- forms and consent
- invoices and payment processing
- reminders
- policies
- client file storage
- follow-up workflow
- records and notes

- retention process

Slide 12: Examples

Scenario: A provider may have a polished Instagram page and beautiful brand colors, but if new clients have no booking link, no intake process, and no clear next step, the business is not operationally ready.

Slide 13:

OST:

What should be put in place first:

- clear offer and service descriptions
- how a client books
- how a client pays
- how forms are completed
- how reminders are sent
- how services are delivered and documented

Slide 14: Intake, Consent, Forms, and Client Communication Basics

Slide 15:

Title: Intake Process

OST:

An intake process should be in place before services begin. Intake forms may collect:

- legal name and contact information
- emergency contact if relevant
- goals and desired outcomes
- health history relevant to the service
- medications, allergies, contraindications, or limitations if relevant
- preferences
- referral source

Sidebar: Jotform provides intake and e-sign form options, including HIPAA-related form features; SimplePractice also supports paperless intake forms and electronic signatures through its client portal.

Slide 16: Example

Scenario: Before a body contouring session, the client should complete a form that captures health concerns, contraindications, emergency contact information if needed, and acknowledgment of pre/post-care instructions.

Slide 17:

Title: Consent and Required Forms

OST Forms that should be in place:

- intake form
- informed consent form
- policy acknowledgment
- service agreement
- liability waiver if appropriate
- privacy/confidentiality notice if applicable