

PracticeBuilding SuccessSystem

Helping Health & Wellbeing Practitioners

Achieve Remarkable Business Results

The Step-by-Step Marketing System
to Help Grow Your Natural Therapy Business

Step 03
Create Your Marketing System

Module 03C
**How to Form Powerful
Strategic Alliances**

Table of Contents

Introduction	3
Definition	5
Professionally Structured	5
Systematic.....	5
Level I vs. Level II Strategic Alliances.....	5
Benefits of Forming Powerful Strategic Alliances	7
"Triple Win".....	7
Exposure / Multiple Two for One Session.....	7
Credibility Factor	7
How To Form Level II Strategic Alliances	8
Step 1 - Identify Potential Strategic Alliances	8
Step 2 - Craft and Send Inquiry Letter	8
Step 3 - Make Follow Up Phone Calls	10
Step 4. Meet with the Prospective Strategic Alliance Partner	12
Critical Success Factors For Successful Strategic Alliances	14
The SAP Must Understand the Benefits and Value of Your Services	14
Personal Recommendation.....	14
Two for One Assessment Consultation Exposure	14
Referral System.....	15
Initial Announcement.....	15
Ongoing Contact	15
Formalising Your Strategic Alliance	16
Sample Letter of Agreement	16
Plan Your Strategic Alliance Strategy	18
Implementation Schedule and Checklist	20
Gratitude Sheets	21

Copyright © 2007 by Margaret Gill. All rights reserved.
 This E-Book is part of the curriculum of Abundant Private Practices and is non-transferable. It may only be used if you have purchased the Practice Building Success System or have enrolled in a paid teleclass or seminar.

Introduction

Dear Therapist,

Are you ready to learn and implement a marketing strategy that can literally fill your practice? Yes, that's right! This one strategy has the potential to fill your entire natural therapy practice!

Strategic Alliances are so incredibly effective due to leverage. By forming a relationship with one person, you have the potential to secure dozens of clients. This relationship can solve the problem of having to get one client at a time.

When Michael started his coaching business 5 years ago he formed a powerful Strategic Alliance with a chiropractor and secured 13 paying clients in 6 weeks! His practice went from 5 clients to 18 and his income jumped to over \$5,000 per month from this one relationship.

I tell you this so you know it can work. But it is not necessarily easy. It requires effort, discipline and a level of professionalism and structure that is deeper than anything you have heard before on this topic.

The good news is: I walk you through exactly what to do! This workbook will give you a solid foundation on **how to make this powerful strategy yield results for you.**

In this class you will learn:

- What I mean by a professionally structured, systematic, Level II Strategic Alliance.
- Why Strategic Alliances are so powerful.
- The step-by-step process for forming Level II Strategic Alliances, including how to:
- Identify potential Strategic Alliance Partners (SAPs).
- Write an effective Inquiry Letter.
- Do effective follow-up calls (including sample phone scripts).
- Conduct an initial meeting with an SAP.
- Co-create a win-win-win relationship.
- The wide variety of ways the SAP can win.
- The critical success factors for an effective Strategic Alliance.

I even include:

- A sample Inquiry Letter you can customise and send to your potential Strategic Alliance Partners.
- A sample Letter of Agreement you can customise and use.
- Sample phone scripts you can use when making follow up phone calls.

Quite simply, forming Strategic Alliances is one of the most potent ways to fill your natural therapy practice. The key, however, is creating more formal, structured, business relationships. I call this "Level II" Strategic Alliances and I am excited to show you exactly what to do – all you need to do is take the action!

So, have fun, get excited, learn this process and start forming Level II Strategic Alliances! It's worth the time and effort!

Be Remarkable



ellz change x x
U

Definition

I define a Strategic Alliances as a professionally structured relationship with a party (ie: a person, business, association, etc.), whereby the Strategic Alliance Partner systematically exposes their client base to your therapies and invites their clients to engage in a Two for One Assessment Consultation with you.

The relationship is win-win-win, meaning there is something in it for you, for the Strategic Alliance Partner (SAP) and for the potential client.

There are two key components of this definition I want to highlight, as they are critical for achieving maximum success:

Professionally Structured

A constant theme in The Abundant Private Practices, Practice Building Success System is the idea of professionalism. It is especially important for effective Strategic Alliances. For example, I recommend you have a written agreement with your SAP. You are forming a type of partnership or professional relationship. It is documented and agreed upon.

Systematic

In order for a Strategic Alliance to be most effective, you need a system by which the SAP refers people to you. The referring process must become a part of their business. It should not be an afterthought, or when it comes to mind, or when they think there may be a perfect fit. Instead, imagine every single one of their clients being systematically, professionally and attractively introduced to you and offered a Two for One Assessment Consultation! Wow!

Level I vs. Level II Strategic Alliances

It is important to note the distinction between "Level I" and "Level II" Strategic Alliances. In the Practice Building Success System I focus on Level II Strategic Alliances, as they yield far, far better results. Of course, Level I Strategic Alliances can sometimes be a good place to start, especially since a Level I can grow into the more powerful Level II over time!

Level I - Example

Fred the massage therapist approaches his accountant and health food store owner. He explains that he is a massage therapist and asks, "If you think of anybody who might benefit from a massage, would you give them my card?" He also asks if he can leave a few brochures for them to hand out and/or put in a place where customers can find them.

Level I – Characteristics

- The alliance may not be "strategic." In other words, the clients of the SAP may not be congruent with Fred's Who and What.
- There is little or no structure to the relationship. No formal agreement.
- The arrangement is very loose. "If you think of anybody..."
- There is no marketing system other than the passive brochures.
- The SAP has no real incentive to proactively promote Fred's massage therapy business.

Overall the relationship is loose, haphazard, informal, unstructured and not very professional. I wouldn't be surprised if Fred got few or no referrals from his accountant and health food store owner.

Level II - Example

Naturopath Susan sends a letter to 21 hairdressers and beauty salon owners in the area, inviting them to lunch to explore the possibility of forming a strategic partnership. She selected hairdressers and beauty salon owners because she specialises in working with female executives on stress reduction and keeping the body in balance to meet the demand of their stressful jobs. Susan realised that certain hairdressers and beauty salons cater to the same target market.

She receives 7 responses. After having the lunch meetings there seems to be a great fit with one of the beauty salon owners. Susan drafts an agreement, spelling out their commitments to one another. Susan is providing half price naturopathy to the owner and staff. They meet two times per month to strategise, implement and fine-tune their "Exposure Strategies," which include a direct mail postcard to all the beauty salon customers, Susan will speak at the salons monthly client event speaking on health and wellness, staff training on offering Two for One Assessment Consultations and properly placed brochures.

Level II – Characteristics

- The SAP's clients are congruent with Susan's Who and What.
- The relationship is structured and professional.
- There is a solid, structured marketing plan in place.
- The staff are trained.
- The Strategic Partner benefits.

Which of these two examples do you think will lead to more results? It really is simple when you get right down to it, huh? This isn't brain surgery.

The therapists who are the most dedicated, disciplined, structured and professional are the ones who are going to be successful. It is that simple!

The key to a successful strategic alliance is to work out who already has your customers and then offer them a financial reward for sending their people to you.

Benefits of Forming Powerful Strategic Alliances

As you can imagine, there are many benefits of forming powerful Strategic Alliances. Here are my "Top 3." I encourage you to come up with more, so you feel how powerful these can be!

"Triple Win"

Marketing strategies are most effective when everybody wins. In fact, I often refer to Strategic Alliances as a "Triple Win." The therapist wins by being exposed to the SAP's clients. The client wins as they get exposed to health benefits of natural therapies and the SAP can win in a wide variety of ways. More on these later!

For now, I want you to think about how very important it is for the Strategic Alliance to be taken seriously and the referral process to become part of the SAP's business. This only happens if they are receiving a benefit or some other "reward" for their efforts!

Exposure / Multiple Two for One Session

The Two for One Session is the cornerstone of the Abundant Private Practices, Practice Building Success System. When you perform numerous Two for One Assessment Consultations, you get multiple clients. It is that simple. What you are looking for in a Level II Strategic Alliance is the opportunity to be introduced to their clients. Your goal is exposure. The beauty and magic of the Two for One Assessment Consultation will take care of the rest!

An effective Level II Strategic Alliance allows you to be exposed to dozens, even hundreds, of people. You then perform Two for One Assessment Consultations and secure multiple clients from the one relationship. This is so much easier and more effective than looking to secure one client at a time!

Credibility Factor

Strategic Alliances are particularly effective because the SAP has credibility with their clients, so when they refer them to you, they are receptive. If it is a trusting relationship, the clients will often follow the recommendation of the SAP!

The joy for you is that they will frequently just phone up and book straight in for a session without you having to do any marketing to those clients directly. It is a joyously wonderful thing when this happens!

How To Form Level II Strategic Alliances

Step 1 - Identify Potential Strategic Alliances

You need to have a specific target market and niche in order to identify the best possible Strategic Alliance Partners. Your goal is to identify the types of businesses who serve the same target market as you do! Right now we are not looking for specific people who you may know. Instead, identify ideas and opportunities.

Below is a list of possible Strategic Alliance Partners. Look at the similarities. All of these groups have clients who can benefit from natural therapies. In addition, many of these people have a personal connection with their clients. Which of these Strategic Alliances might be congruent with your Who and What?

Chiropractors	Lawyers	Financial Planners
Personal Trainers	Gym Owners	Bankers
Massage Therapists	Spa/Salon Owners	Accountants
Doctors	Hairdressers	Many, many more!

For example, let's say you work with small business owners. What type of professionals already have a favourable relationship with small business owners? How about accountants? Especially those who specialise in small business owners! Financial Planners also come to mind, as well as printers, bankers, web designers, the Chamber of Commerce and lawyers.

Imagine, for example, forming a strong Strategic Alliance with a successful and trusted accountant who has 200 small business owners as clients. The accountant fully believes and supports your natural therapies and systematically informs all of his clients about your services and funnels them into Two for One Assessment Consultations.

Or, let's say you were a coach who worked with single divorced women on finding their soul mate. Imagine forming an alliance with a matchmaking service, speed dating club, a women's health club or a divorce lawyer. The opportunities are endless!

For natural therapists the best form of strategic alliance is an already successful health and well-being centre. They already have like minded clients who want and need the services you provide. In the early days of setting up a practice, working out of an already established clinic gives you clients, experience and confidence very quickly.

Step 2 - Craft and Send Inquiry Letter

Once you have identified opportunities that are congruent with your target market and niche, it is time to craft a letter and reach out to your potential SAPs. Please note, even though the Strategic Alliance relationship is win-win-win, not

everybody is going to be receptive to your inquiry. This is important so that you do not “put all of your eggs in one basket.” Like the sales process, it is a numbers game, so the more people you reach out to, the more likely you are to ultimately have success.

We are assuming that you do not have a personal relationship with your prospective SAPs. If you do, of course reach out to them first! An existing relationship or a referral will dramatically improve the likelihood of securing a meeting to explore the opportunity.

Keys for a Successful Inquiry Letter

1. **Be brief.** The goal is to set up a meeting to discuss the alliance. You are not looking to sell them in this initial contact, instead just spark their interest.
2. **Explicitly state** that you are *not* trying to sell them anything.
3. Present a few of your ideas on **how the relationship can benefit them.** People are most interested in the “WIIFM” (“what’s in it for me?”) principle. Tell them!

Sample Inquiry Letter

Dear Mr. Smith,

My name is <your name> and I am a natural therapist. I am interested in speaking with you about forming a mutually beneficial strategic partnership.

Mr. Smith, I am not looking to sell you anything. Rather, I believe my natural therapy services would be of tremendous benefit to your financial planning clients and I am willing to compensate you greatly for referrals. The best thing would be for us to meet for 30 minutes and I will share with you some of my ideas, but here are just some of the ways you could benefit:

- Passive income by receiving a referral fee from me.
- Complimentary treatments for you and members of your staff and immediate family.
- Complimentary or reduced fee consulting services.
- Any combination of the above.

These are just examples, as we would co-create a plan that is best for you. I am very adaptable. We will also discuss creating a system whereby my introduction to your clients is done in an attractive, non-threatening way. All I am looking for is exposure. I will take it from there.

Mr. Smith, natural therapies are a magnificent way to help your clients reach optimum health and keep their body mind and spirit in balance. Please do not underestimate the impact natural therapies can have on their lives and the value they will receive, all of which could begin with you. Please enjoy the information I have included on therapies in general and my services in particular.

I will call you next week to see if you are available to schedule an appointment at your office. I look forward to speaking with you and sharing with you the beauty of natural therapies and the benefits it can have for you and your clients.

Sincerely,

<Your name>

Step 3 - Make Follow Up Phone Calls

It is critically important that you follow up your Inquiry Letter with a phone call! In fact, if you are not willing to make follow-up phone calls, I will even go as far as to say don't even bother writing and sending an Inquiry Letter! I know this may sound extreme, however people are busy and in this case I am assuming that the potential Strategic Alliance Partner does not know you. In this scenario, a letter on its own will rarely generate a response. Therefore you must follow-up!

The best way to follow up is with a phone call. It is important to mix your "touches," as people respond differently to different forms of communication. In addition, you cannot form an effective Strategic Alliance without having a conversation, so once your initial inquiry is made via letter it is time to get on the phone!

Keys for Successful Follow-Up

Here is how I recommend following up and what I have found works best. This approach has been tested in several industries and is excellent for people like therapists who aren't necessarily excited about sales and marketing.

Block Out Time for Follow Up

You must block out time on a weekly basis for following up on your marketing strategies, whatever they may be. Studies show that, on average, you can make 10-15 follow-up phone calls per hour, so budget your time accordingly. If you sent out 30 letters, budget 3-4 hours of time. (This assumes that more than half of the people will not be available and you will leave messages 60% of time.)

Reward Yourself

If you really dislike this part of your business, due to fear of rejection, etc., I recommend that you incorporate a reward for the evening after your follow up calls. Of course, this differs for everyone. Perhaps a nice hot bath, a massage, a movie, a nice dinner, a walk on the beach.

The key is to reward yourself! Make your business building fun! Also, the key is to reward yourself for the action, not just for the results.

Prepare/Fine Tune Your Script

Use the example below and create a script based on your unique personality and style. As you gain more experience you will quickly learn what you are most comfortable with and what works best. Relax, be yourself and have fun! People

will be most attracted to you when you use a natural, comfortable approach that fits who you really are.

Visualise

As is true with every form of follow up, it is very important that you vividly visualise a smooth flowing conversation. I recommend doing a “master visualisation” prior to all of your calls and a “mini” visualisation prior to each call.

Please do not skip this step! As a therapist I trust that you know the importance of leveraging the power of your mind. You get what you think about. The energy that is sent to the Universe connects with your contact and produces a powerful result.

Make The Call!

Well, the only thing left is to “smile and dial!”

Sample Follow-Up Phone Scripts

Following are some sample scripts for your follow up calls. There are a vast array of potential paths your calls can take, and I do not want to write a book on word-for-word scripts covering every scenario. Rather use these as a guide to get the ball rolling. With practice, you will quickly get into a flow that is congruent with your particular style.

As noted above, expect to leave messages approximately 60% of the time. Do not be disappointed if you get voicemail! Expect this and you will not be disappointed.

If you leave a recorded message, I recommend you say something similar to this:

"Hello Mr. Johnson. This is <your name> from <your company name>. I am the natural therapist who sent you a letter last week about forming a Strategic Alliance together. Just following up to insure that you received the letter. Mr. Johnson, I am very confident that my services can be a tremendous asset to your clients and a Strategic Alliance can benefit you in a variety of ways too. I'd love to take you to lunch to discuss this further. Would you please call me back at xxx-xxx-xxxx. Thanks and have a great day."

I do not recommend that you leave more than one message. Keep trying until you get the person, because leaving multiple messages can be annoying.

When you do get through, I recommend a very similar approach:

“Hello, Mr Johnson. This is <your name> from <your company name>. I am the natural therapist that sent you the letter last week about forming a mutually beneficial Strategic Alliance. Did you have a chance to read the letter?

I wonder if I might take just a moment and give you a summary of the letter?

Can I take you to take you to lunch so we can get to know one another and discuss this in more detail?

I am a <your modality> who specialises in <your speciality>. I think I can be of tremendous service to your clients and I am willing to reward you in a number of ways for referrals. Does this interest you?"

The key is to find out and gauge their interest. Next you want to summarise the key points of the letter and set up a time to meet with them!

Step 4. Meet with the Prospective Strategic Alliance Partner

What an exciting opportunity, to meet with a prospective Strategic Alliance Partner! Remember, this one relationship can potentially fill your practice! Not to say that in order for a Strategic Alliance to be effective, you need to experience this level of success. Any exposure to prospective clients is a win for you. Remember, all you are looking for is exposure, the opportunity to conduct Two for One Assessment Consultations. You will take it from there!

Do not feel like you need to have everything figured out before you set up your meetings. This may paralyse you and keep you from reaching out. This is an exploratory meeting. You are looking to get to know one another, for you to share the beauty of natural therapy, to learn about their business and if there is a fit, to co-create your professional relationship.

The term "co-create" is key! Use what you learn in this class to prepare for the initial meeting. Give thought to ways the partnership can be structured and how you would like to "reward" the SAP. Then, at the meeting, discover what the SAP really wants and how they would most like to benefit from the Strategic Alliance. From there the two of you can co-create a customised Strategic Alliance that is truly win-win-win.

Ways the SAP Can "Win"

I have identified several ways a Strategic Alliance Partner can benefit from forming a relationship with you. I strongly encourage you to use these ideas to spur your thinking so you can truly customise your partnership to best create the Triple Win and serve the needs of the SAP. The more the SAP "wins," the more she will do her part to make the partnership work and refer people to you.

Goodwill

Do not overlook or diminish goodwill as a benefit to the SAP.

Refer Clients to SA

A quick and easy benefit to the SAP is a reciprocal referral arrangement, whereby you refer your clients to them.

Trading Services

Another way the SAP can “win” is by receiving free or discounted services, either for himself and/or his staff. Let’s say you charge \$100 per month for your services and your SAP comes for treatments each month. The SAP would receive \$1,200 worth of services! That is a lot of money! If the system is set up in the right way, it is a nice exchange for very little work. This of course, does not even take into account the improvements in the health and well being of your SAP.

Consulting / Work Project

Yet another way to provide value to the SAP is by consulting or doing some type of work for them. As an example, speaking at client events is a great way to help. Often finding speakers can be a bit of a nightmare but having you to do regular talks or hands on demonstrations on the different aspects of health and wellbeing will help spark interest and hopefully benefit many of their clients. It will also give you greater exposure to new people.

Pay a Referral Fee

Let’s begin with a question: Would you rather earn \$300 per month per client and have to do all of the marketing yourself, or would you rather earn \$250 per month, pay a \$50 referral fee per month and have a steady stream of potential clients referred to you?

For me it’s the latter every time! I am very generous around referral fees because it means I don’t have to get in the car and beat the streets for hours on end, sometimes coming back up the hill with no results. Marketing is time consuming and tiring when it isn’t your core area of expertise. Having someone else market on your behalf is magic.

There are a number of ways to determine the referral fee and the key is, of course, to co-create it with the SAP. In general, I recommend 10%-20% of your fee be given to the SAP in exchange for the referral.

At first glance, it may seem quite generous to give the SAP 20% for the course of the client relationship, which can be quite long. I agree, it is generous! And, you need to impact the SAP so you stay in the forefront of their mind and send people your way!

Note: Some professionals are prohibited by law from receiving referral fees. Research this before you send your inquiry letter.

Note: When offering a referral fee, do NOT inflate your fees in a Strategic Alliance arrangement in order to make your same rate. There is universal energy at work in an Alliance and allowing the flow of money out, makes room for money to flow back into your business. Sharing money around adds to the flow. By falsely raising your prices you would block the flow and show yourself to be out of integrity as well.

Critical Success Factors For Successful Strategic Alliances

The SAP Must Understand the Benefits and Value of Your Services

To maximise the success of a Strategic Alliance, you want your SAP to become a “Raving Fan.” It is one thing for a SAP to refer people to you from time-to-time because they are your friend, or because you asked them to, or because they get a referral fee. It is quite another thing when the SAP is getting treated by you and is receiving tremendous benefit themselves! It is important that they be able to communicate to their clients the benefits of your therapy. The more understanding, energy and excitement your SAP has about your services, the better!

Personal Recommendation

The KEY to really making this work is for the SAP to personally recommend you to all of their clients. The best example I can give is the real-life example Michael Charest, the founder of this system, had with his Strategic Alliance Partner, Dr. David Birdsall. As you read this particular example, think about how this type of system can be applied to YOUR Strategic Alliance!

Example

Dr. Birdsall’s patients would come in for a chiropractic adjustment. Let’s say they were having low back pain, for example. Dr. Birdsall would remind them that low back pain is often a symptom of stress, in particular financial difficulty. He would inquire if they were under pressure. If they answered yes, which they invariably did, he would remind them of Michael’s services. Specifically he said,

“You know, Bob, about the coach I have partnered with, right? Have you had a session with him yet? You really should, Bob. He specialises in helping people just like you. He is a great guy and I think you would really enjoy speaking with him. He offers a complimentary consultation. No pressure, no obligation. Just meet with him and see if you guys are a fit. Just let Tracy know on the way out and she will schedule a meeting with him!”

Two for One Assessment Consultation Exposure

It is not important for the SAP to “sell” your therapy. You do not need them to do this, nor do you even want them to. You are the expert. All you are looking for from the SAP is exposure. Your therapy will not necessarily be right for everybody and you will not want everybody as a client. All you want are Two for One Assessment Consultations so you can take it from there.

Also, in the best case scenario, you do not necessarily want the SAP qualifying their clients in any way for you. Yes, perhaps as the relationship progresses,

you can educate the SAP on the profile of ideal clients, but in the beginning, you want to focus on maximising your exposure.

Referral System

Ideally, you want to develop a structured and systematic process by which the SAP sends you referrals. You do not want the referral process to be left to chance. For example, only when the SAP thinks of it. Here are some examples of what I mean by systematised:

Visible Brochure

Your brochure and/or marketing materials should be made available to the SAP's clients. Create an attractive display case and have them in the lobby, for example, of the SAP's office.

Trained Staff

If the SAP has staff, they should be trained and educated on the benefits of your service and how to answer the basic questions the SAP's clients may ask. Train the staff exactly how to refer people to you and how to offer the Two for One Assessment Consultation.

Initial Announcement

Once you have an agreement with the SAP, I recommend that an initial communication be sent to the SAP's database. You and the SAP can craft an exciting and powerful direct mail piece that announces the alliance, introduces you, articulates the benefits of your therapy and offers a Two for One Session. Be creative with this! Perhaps you offer an open house, a teleclass or free workshop or talk. The key is to create excitement and provide opportunities for the existing clientele to experience you. It is important that the initial announcement be written or co-authored by the SAP, as she is the person who has credibility with her clients.

Ongoing Contact

It is important that the SAP's clients be reminded occasionally about your services. An excellent way to do this is to co-author a monthly newsletter. Or you could send out an email inviting the SAP's clients to subscribe to your newsletter. You can also sponsor creative things such as monthly workshops, forums, teleclasses, etc.

Formalising Your Strategic Alliance

I strongly recommend you have a written agreement when creating a Strategic Alliance. While your written agreement can take many forms, a simple Letter of Agreement that outlines the terms of the Strategic Alliance agreement and is signed by both parties is an easy and effective way to document the specific details of your partnership.

Below is a sample Letter of Agreement Michael used with his SA with the Chiropractor. Note that it addresses these key areas:

- Strategic Alliance Commitment
- Therapist Commitments
- Compensation
- Training
- Marketing/Promotion of Alliance

Sample Letter of Agreement

This document is the culmination of our previous three meetings and serves as an agreement of our strategic partnership at Inside Out Wellness Centre.

What Inside Out Provides

IO and Dr. David Birdsall promise to, in good faith, expose his chiropractic patients to Michael Charest and Growth Unlimited coaching, in a professional, structured and systematic manner. This system will be refined as time progresses, but the basic outline is below. The key point is that Dr. Birdsall commits to speaking highly of coaching and working in good faith to refer his patients to Michael.

Brochure Placement

IO will allow GU to display professionally created brochures in the lobby and in other areas throughout the centre.

Staff Training

IO will make its staff available for a 3 hour training session, date TBD, so Michael can educate and train the staff on how to answer client questions about coaching. IO will also make the staff available from time to time for GU to communicate updates, provide additional training and support as needed.

Client Communication

IO will work with Michael to create a launch letter to send to all IO patients. The database is owned and protected by IO, but all clients will receive the initial launch. IO will also work with Michael to create and “ongoing communication plan” so IO patients are exposed to coaching on a regular basis. Dr. Birdsall

promises to personally promote coaching to his clients in the adjusting room and offer complimentary sessions with Michael.

GU Commitment

Michael will coach Dr. Birdsall 3 times per month for 40 minutes per session on the telephone. The main focus point is to help Dr. Birdsall grow his chiropractic business, but this can of course change.

Michael will also attend weekly IO staff meetings, so he is aware of the centre operations, HR issues, etc. so that he can provide Dr Birdsall with effective consultation.

GU will pay IO a referral fee equal to 20% of the gross coaching revenue from clients referred by IO. This is to be paid on a monthly basis. As an example, if a client hires GU for coaching at \$350 per month, GU will provide IO with a referral fee of \$70 per month for the duration of the coaching contract.

Strategic Alliance Partner and Coach have read and agreed to the above:

Coach – Michael Charest

Signature: _____ Date: _____

Strategic Alliance Partner – Dr. David Birdsall

Signature: _____ Date: _____

Plan Your Strategic Alliance Strategy

Hopefully you see the benefit of forming Level II Strategic Alliances. Use the following page to plan out your next steps and then get to work!

My objectives or goals for creating a powerful, win-win-win Level II Strategic Alliance are:

Some of the reasons why I am excited about this are:

Some potential types of Strategic Alliance Partners are:

Some specific people I know who could be a Strategic Alliance Partner are:

Some of the ways I could “reward” my SAP are:

My next steps are:

The concerns or challenges I have about Strategic Alliances are:

My strategies to overcome any concerns or challenges are:

Implementation Schedule and Checklist

Use this chart to create a timeline for working on forming Strategic Alliances. In the TARGET DATE column indicate when you want to do each task. Use the ACTUAL DATE column to indicate when you actually complete it and then “check it off!” Use your coach to get feedback on your letter and hold you accountable!

TASK	TARGET DATE	ACTUAL DATE	√
Identify general SAPs			
Find specific SAPs			
Identify ways to “reward” SAP			
Write Inquiry Letter			
Send Inquiry Letter			
Make Follow-Up Phone Calls			
Have Initial Meetings			
Create a Written Agreement			
Train the SAP			
Send an Initial Announcement			
Create a Referral System			
Have Ongoing Contact			

Gratitude Sheets

This week I am grateful for:

71.

72.

73.

74.

75.

76.

77.