



HOLISTIC IOWA'S GUIDE
to
BASIC
BEST PRACTICES
FOR HOLISTIC, WELLNESS, AND
SPIRITUAL BUSINESSES



SETTING THE FOUNDATION FOR SUCCESS

Holistic, wellness, and spiritual businesses play a vital role in enhancing the well-being of individuals and communities. To thrive and provide the best possible services, it's crucial to adhere to professional best practices. This guide by Holistic Iowa is designed to help you navigate the path to professionalism, compliance, and building trust with your clients.

We offer this checklist as the start of very basic best practices, and encourage you to continually build upon it so that it serves your clients AND you for the long run.



BASIC BEST PRACTICES

Use this checklist as a reference to ensure that your holistic, wellness, or spiritual business is meeting professional standards:

1. Business Registration:

- *Action Steps:* Register your holistic, wellness, or spiritual business with the appropriate government authorities and ensure compliance with local, state, and federal regulations. This typically includes obtaining any required licenses or permits.
- *Resources:* Consult your local government website or chamber of commerce for information on business registration procedures. Additionally, consider seeking legal advice from an attorney with expertise in business registration. Iowa Secretary of State's website is: <https://help.sos.iowa.gov/how-do-i-form-llc>



2. Professional Credentials:

- *Action Steps:* Display your professional credentials, certifications, and qualifications prominently on your website, marketing materials, and in your physical location, if applicable. Ensure that these credentials are readily verifiable.
- *Resources:* Maintain copies of your professional certificates, licenses, and qualifications for quick reference. You can also display them in frames or professional plaques within your practice.

3. Business Website:

- *Action Steps:* Create and maintain a professional, user-friendly stand-alone website, (not run on a social media channel), that provides detailed information about your holistic, wellness, or spiritual services, the team, and the history of your business. Ensure your website is regularly updated.
- *Resources:* Use website builders like WordPress, Squarespace, or Wix to design and manage your website. Consider professional web design services for a polished look and effective user experience.

4. Contact Information:

- *Action Steps:* Make your contact information, (at the very minimum an email address) easily accessible on your website, social media profiles, and any other online channels you use for communication with clients.
- *Resources:* Implement contact forms, contact widgets, or chat services to facilitate easy communication. Ensure your contact details are clearly visible on all digital and physical materials.


5. Business Hours:

- *Action Steps:* Clearly list your regular business hours on your website, social media profiles, and any promotional materials. If you have variations in hours for holidays or special occasions, provide this information as well. At very least, “By Appointment,” but it is recommended to have a regularly set schedule available to your clients, even if it’s one day a week, twice a month, etc.
- *Resources:* Use online scheduling software or booking platforms to manage and display your business hours accurately. Ensure consistency across all online channels.

6. Online Booking or Purchasing:

- *Action Steps:* Offer convenient online booking or purchasing options for clients. Implement a user-friendly, secure system that allows clients to schedule appointments or buy your products and services online.
- *Resources:* Consider using scheduling and booking tools like Calendly, Acuity Scheduling, or specialized e-commerce platforms like Shopify for selling products and services online.

7. Pricing Transparency:

- *Action Steps:* Provide clear and detailed pricing information for all your services and products on your website. Include any relevant fees, payment methods, and available packages.
 - *Resources:* Utilize e-commerce tools like WooCommerce, BigCommerce, or Square for transparent pricing, shopping cart integration, and online payments.
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8. Privacy Policies:

- *Action Steps:* Develop and publish comprehensive privacy policies and legal disclaimers on your website to ensure compliance with data protection regulations.
- *Resources:* Consult legal professionals with expertise in privacy law, or use privacy policy generators tailored to your specific needs.

9. Service Descriptions:

- *Action Steps:* Create comprehensive and well-detailed descriptions for each of your services, including what clients can expect, benefits, and any prerequisites.
- *Resources:* Utilize website content management systems (CMS) like WordPress for maintaining detailed service descriptions.

10. Cancellation and Refund Policies:

- *Action Steps:* Clearly outline your policies for cancellations and refunds, making them easily understandable for clients.
- *Resources:* Consider using legal templates and customize them to your specific business needs. Include these policies in client agreements and booking confirmations.

11. Client Reviews and Testimonials:

- *Action Steps:* Encourage clients to leave reviews and testimonials about their experiences. Make it easy for them to share their feedback through your website, social media, or dedicated review platforms. Regularly monitor and respond to reviews, both positive and negative, to engage with clients and demonstrate your commitment to their satisfaction.
- *Resources:* Utilize review management software like Trustpilot, Google My Business, or Yelp to collect and showcase client feedback effectively. Also, consider using social media tools to encourage reviews and track engagement.



12. Consent Forms:

- *Action Steps:* For services or treatments that require informed consent, create consent forms that clearly outline the procedure, potential risks, benefits, and any alternatives. Ensure clients read and understand the form before proceeding and maintain signed copies securely.
- *Resources:* Digital signature tools such as Adobe Sign, DocuSign, or HelloSign can simplify the process of obtaining and storing electronic consent forms securely.

13. Safe and Hygienic Environment:

- *Action Steps:* Regularly clean and maintain your physical space to create a comfortable and professional atmosphere. Follow local health and safety guidelines, including proper sanitization protocols, to ensure a safe environment for clients.
- *Resources:* Access government health and safety guidelines specific to your industry or location to stay informed about best practices. Consider using professional cleaning services to maintain a clean and hygienic environment.

14. Secure Payment Processing:

- *Action Steps:* Implement secure online payment processing methods to protect client data during transactions. Choose reputable payment processors like Stripe, PayPal, or Square to enhance payment security and build trust with clients.
- *Resources:* Explore the security features and guides provided by the payment processors you select to ensure safe payment processing. Consult with experts in payment security to bolster online transaction safety.





15. Client Communication:

- *Action Steps:* Maintain professional and prompt communication with clients through email, phone, and other relevant communication channels. Respond to inquiries and address concerns with care, showcasing your commitment to client satisfaction.
- *Resources:* Utilize email marketing platforms like AWeber, MailChimp or Constant Contact for efficient and organized client communication. Consider implementing customer relationship management (CRM) tools to manage client interactions effectively.

16. Continuing Education:

- *Action Steps:* Stay updated with the latest industry trends, research, and techniques by engaging in ongoing education and training. Participate in workshops, webinars, and online courses to expand your knowledge and skills.
- *Resources:* Explore online learning platforms like Coursera, Udemy, or industry-specific associations and publications to access relevant educational resources.

17. Insurance:

- *Action Steps:* If applicable, obtain liability insurance that suits the needs of your holistic, wellness, or spiritual business. Consult with insurance providers that specialize in your industry to find coverage that protects your business and clients.
- *Resources:* Connect with insurance companies that offer tailored coverage for holistic, wellness, and spiritual businesses. Ensure that the insurance policy you choose aligns with your specific services and requirements.





18. Accessibility:

- *Action Steps:* Ensure your business space is accessible and welcoming to individuals with disabilities. Make any necessary physical adjustments and follow accessibility guidelines to create an inclusive environment.
- *Resources:* Access accessibility guidelines and requirements established by local and national authorities. Consider consulting with accessibility experts or organizations specializing in inclusivity.

19. Professional Boundaries:

- *Action Steps:* Establish and maintain professional boundaries with clients to ensure privacy and comfort. Develop clear policies for maintaining confidentiality and professionalism, and communicate these to your staff and clients.
- *Resources:* Create and communicate professional boundaries through written policies and codes of conduct. Consider involving legal professionals in drafting these policies to ensure compliance with relevant laws.

20. Client Records:

- *Action Steps:* Keep client records secure and confidential, adhering to privacy regulations. Utilize electronic record-keeping systems and data protection tools to ensure the confidentiality and security of client information.
- *Resources:* Explore data protection tools, electronic health record (EHR) systems, and legal templates designed for privacy compliance. Consult with experts in data protection and privacy regulations to maintain secure client records.



GRADE YOUR BUSINESS

Go back through and decide for each item on the checklist:

For that item, is your business:

★★★★ - Going above and beyond

★★★ - Meeting basic standards

★★ - Needing work

★ - Missing this piece

0 - Irrelevant to your business

The ones you've marked with just 1 star are where to start.

PROFESSIONAL EXCELLENCE: THE PATH FORWARD

By adhering to these professional best practices, your holistic, wellness, or spiritual business can not only ensure compliance with legal and ethical standards but also build trust with clients. Professionalism, transparency, and a commitment to well-being will set you on a path to success and contribute positively to the holistic and spiritual community. Embrace these best practices as the foundation for your journey of growth and transformation. Holistic Iowa encourages all providers and businesses to meet these best practices to create a safe, nurturing, and professional environment for clients and the wider community.

DISCLAIMER

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This guide is not a substitute for professional legal, financial, or regulatory advice. Business owners and practitioners in the holistic, wellness, and spiritual industries should seek appropriate legal and professional guidance to ensure compliance with local, state, and federal regulations.

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