



Structured Program Template

This template will help you build out a structured 3-phase holistic care program. The purpose of the outline is to help you define your audience, clarify the learning sequence, and articulate the content of the entire three phase program, as well as provide detail on each of the three phases .

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Target Market

- Who is your target market? Why did you select them?

- What health issue or health condition are they looking to resolve?

- What are their top 2-3 priorities?

Expected Outcomes

What specific, measurable results will your clients realize by the end of your program?

Specific Result	Measurement
1.	
2.	
3.	

Program Duration

- How long is your program?
- How many hours per week do you meet with your clients?
- How much time between sessions does your client devote (on average) to assignments and activities?
- How many hours do you spend *per client* between sessions?

Program Logistics

- What percentage of your program is face-to-face (in-person) meetings with clients?
- What percentage of your intake/health history forms are paper-based?

Establishing Client/Practitioner Expectations

- What *behaviors* do you expect from all your clients (e.g., keeping an open mind, willingness to share personal history, following through on assignments, etc.)

- What *technical capabilities* do you expect? (e.g., access to a computer with high speed internet access, basic knowledge about the internet, ability to exchange emails, participate in on-line discussion groups, etc.)

- What should your clients expect from you (e.g., confidentiality, clarity, support, etc.)?

- How and when will you communicate these expectations?

SAMPLE Outline for a Three Phase Holistic Program

This outline highlights the major components of a well structured holistic program. Clients move through a sequential, predictable and progressive series of assignments, activities, and assessments to achieve a meaningful result. A well-structured program (augmented with outstanding coaching skills) helps you see more clients and deliver higher quality services more consistently and with less effort. Also, a well structured program can be delivered “virtually” – over the phone and using Internet based technologies.

Phase 1: Building Self-Confidence

Primary Objectives

- Client and practitioner establish rapport
- Both set and clarify expectations
- **Practitioner** creates an initial plan with specific/measurable goals
- Client and practitioner monitor plan and make adjustments
- Clients reflect on experience with practitioner’s direction and support

Assignments/Activities/Assessments

- Assignment with a “stretch goal” tied to a significant outcome
- Expand understanding of issue/condition through information
- Keep a journal to monitor progress and learn from experience

Phase 2: Deepening Self-Awareness

Primary Objectives

- **Practitioner and client co-create** a plan that builds on self confidence and strengthens self-awareness
- Client follows their plan and stays accountable, makes their own adjustments
- Client strengthens confidence and deepen self-awareness by reflecting on their experiences
- Client learns to speak more authentically and honestly about their real needs and desires

Assignments/Activities/Assessments

- Client creates and follows their own assignment with practitioner support
- Client continues to learn from their experience through journaling and reflection
- Client practices asking for support from their network (family/friends/co-workers)

Phase 3: Establishing Self-Care

Primary Objectives

- Client builds on-going support in their network
- Client creates and commits to self-managing plan
- Practitioner gets feedback on themselves and their program
- Practitioner and client close the engagement with a celebration

Assignments/Activities/Assessments

- Client “teaches back” to the practitioner what they learned
- Client enrolls their network into their self-managing plan (if necessary)
- Client creates rituals and habits to keep them on track and accountable

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To learn more about how to bring this kind of structure into your holistic program, contact me today!