

Hello,

As wellness practitioners, our greatest challenge is finding more clients and gaining a sustainable revenue. We can sit and wait for clients to show up at our door. Or we can be more proactive. Working with corporations can provide a very viable source of revenue. But there's a path to achieving this.

Take a look at this guide. I've provided a template you can use to help you get your foot in the door and achieve your goals. It's based on what the corporations are expecting to see from you in order to consider working with you.

Working with corporations requires some homework and planning. But it's worth it. Once you're in, you can develop a consistent stream of revenue to sustain your business.

You'll meet lots of people and create a viable network for yourself that can reap other benefits and opportunities as well. The biggest mistake you can make is to wait for things to happen.

Jump in the water. It may feel cold at first, but it definitely warms up.

Over the last year, I have created many proposals for my own work for many different business activities, and I always achieved a positive result. The comment I hear most often from companies is how impressed they are with my professionalism, and that was thanks to the proposal.

If you could use my help with this, please feel free to book an appointment [here](#). In the meantime, use this guide to think outside the box and seize this opportunity to gain more control over your business.

Wishing you all the best,

Lorene Sauro, RHN



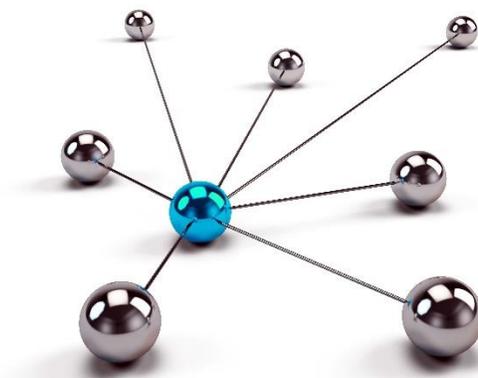
## Creating A Corporate Proposal

### Why should you want to work with corporations?

- ✓ Provides good money
- ✓ Helps build your network of connections
- ✓ Helps for finding clients
- ✓ Can be a career in itself

There are two ways to look at working in the corporate world:

1. Working with many companies, doing the same presentation over and over
2. Developing a deeper relationship with several corporations by engaging in multiple activities (beyond presentations) such as seeing clients one-on-one on the company premises or creating wellness programs



### Why should you create a corporate proposal?

It's the normal way to present what you have to offer in a professional manner. Corporations often post a request for proposal (RFP) when looking for various people for different types of work.

If a company posts an RFP - follow their instructions to the letter. Otherwise, use the outline in this guide for success.

### Do companies want wellness information for their employees?

Yes, this has been happening for many years. It's an industry with an established protocol. It may seem as if it's difficult to be considered, but corporations are always looking for new topics.

Typically, most corporations run their wellness opportunities through the human resources department. Start there. If a company has a wellness department, the human resources department can point you in that direction.

Many companies use corporate booking agents. These agents have a roster of speakers and practitioners that they hire to go into the corporations. They, too, would be open to new people, especially those who have new topics.

To help you create the best proposal, contact the corporations or booking agents so you can specifically research what they're looking for. Cold calling by phone and email does work. It may take a few tries to find interested companies.

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## Corporate Proposals Can Be Used For:

- ✓ Lunch 'n' learns
- ✓ Healthy eating programs
- ✓ One-on-one sessions
- ✓ Health fairs
- ✓ Community programs
- ✓ Creating content for company newsletters

## Parts of A Proposal

### Cover Page:

It doesn't have to be fancy. It should contain your name, your logo, your contact information and the title of the proposal, e.g., Services for Stress Reduction Techniques. It can contain an image.



### Table of Contents:

This lists the different sections and the page numbers.

### Introduction:

It should be a single page and serve as a reminder of the benefits of wellness programs as well as include some brief information about the program. It's usually two paragraphs. It reminds companies of the benefits they will receive, such as lower health care costs and any other known benefits that the company will value.

### Proposal Idea:

There should be one page that discusses the purpose and benefits of the proposal. Statistics are helpful. It should be simple and straight forward.

### Operational Plan:

This is an outline of what you offer and the cost. It includes the number of hours it involves for the employees, e.g., 1 hour for lunch 'n' learns. It should also include any materials that will be provided such as handouts.

### Short Bio:

It should be 1 or 2 paragraphs and 250 words. It should state your credentials, your experience and any areas of specialty you have.

### Resources:

This is a list of people or companies you have worked with. Or it could include people you have as resources to show the depth of who you are. These do not have to be nutrition resources - just people or companies that can speak to your professionalism. You can add a couple of very short testimonials here as well.

### Appendix:

It includes information that will be helpful to making your point. It could be an article that describes the cost savings or increased profits for a company that provides wellness

information to employees. Or it could be about new information that is available now about a wellness topic. Each article or topic of information is a separate appendix.

## Important Points to Remember:

- ✓ Proposals will change with each client.
- ✓ Companies will require you to have liability insurance. They may state this, but just as often they assume you have it so be sure that you're covered.
- ✓ You should have a simple contract for corporate clients to sign so there is a clear understanding for payment, photocopies and branding. Many companies are going paperless and will email handouts on your behalf.
- ✓ It's important to let people get to know you. You may have a good conversation with someone, but it doesn't lead to work. Try again. Always ask them what they're looking for.
- ✓ If you can find another way to be involved - like contributing to their employees' newsletter - do so. The more people that see your name, the more likely the company will work with you.
- ✓ Once hired, provide reports regarding your activities. They need to see what they're getting. Don't assume they know. Be prepared to survey clients or attendees. Often the company will do this for you.
- ✓ You need to adhere to HIPAA or PIPEDA standards for privacy.
- ✓ Payment occurs when you send an invoice. It must have an invoice number, list of services, and payment terms. The only name that should appear on the invoice is the name that needs to be on the cheque so it can be cashed. Some companies may provide a credit card for those who have a setup for taking a credit card, such as Stripe or PayPal virtual terminal.
- ✓ Some companies participate in wellness certification programs. These can help lower their insurance costs for employees.

[Excellence Canada](#) provides a wellness certification for companies.

[WELCOA \(Wellness Council of America\)](#) has a website that provides comprehensive articles, reports, surveys and other helpful tips for developing wellness programs within organizations.

Lorene Sauro, RHN, has spent 20+ years in the wellness industry (even longer in the food industry), and she's pretty much done it all: seen clients, learned what she needed for having an online business, worked with big corporations and small businesses, researched nutrition, learned all aspects of legalities and professionalism, created and manufactured recipes, done contract work, wrote a book, learned to copywrite, and taught all kinds of programs and courses. She can help you.

If you would like Lorene's help, then [click here to learn more.](#)