

Your *Heart and Soul
of Success*

Diagnostic Questionnaire

**For Realizing Your
Dream of Creating a
Thriving Holistic Practice**

**Dr. Phillip Mountrose and
Dr. Jane Mountrose**

Notes to our Readers

Navigating through this e-book: If you want some tips on using Adobe PDF files, you can find instructions on our website at www.gettingthru.org/badobe.htm.

Please don't copy or give away this e-book. Hundreds of hours have been devoted to the creation of this workbook. Your purchases support the Awakenings Institute, a non-profit organization, in its mission of helping people to realize their true potential and creating a more loving world.

Published by: HOLISTIC COMMUNICATIONS

P.O. Box 279, Arroyo Grande, CA 93420

Website: www.gettingthru.org/

E-mail: joy@gettingthru.org

Version 1.1

Copyright © 2010, Dr. Phillip Mountrose and Dr. Jane Mountrose

No part of this e-book, in part or in full, may be reproduced in any form or by any means, including photocopying, recording, or by an information storage and retrieval system, without the express written consent of Phillip Mountrose and Jane Mountrose, except in the case of brief quotations used in articles and reviews.

Table of Contents

1. Overview	1
2. Diagnostic Questionnaire	3
3. Taking Action	9
4. Following Up	11
5. About the Authors	13

1. Overview

Are you confused about how to take your next steps to create a prosperous holistic practice?

Would you like to increase your clarity and confidence and follow the path created by successful practitioners who have done what you want to do?

If so, this checklist was designed for you. We commend you for opening to your potential and taking your next steps. As the Founding Directors of the International Association of Holistic Practitioners, we first want to assure you that you're not alone. Others have paved a path to create the kind of success you long to enjoy.

We hope that exploring this material and taking action to make positive changes in your practice and your life will take you on a wonderful adventure, as building our practice has for us. If you're like many people, it's easy to get overwhelmed with too many options.

What to do? Where to start? These are common questions that can be part of a frustration in dealing with a sea of information about promoting your business.

Remember that you're not alone. We spent years using the "Lone Ranger," trial-and-error approach, with some success. Then, with the emergence of the internet, new possibilities became available and we discovered that connecting with others who have done what we wanted to do was a much more effective approach.

The Good News Is ...

Now we find ourselves on the cutting edge of a new wave of possibilities. Our goal is to distill what we have learned so you can bypass much of the trial and error and take your practice to the next level now.

We have done extensive research and implementation and continue to follow the most current trends. Our aim is to pass our expertise on to make things as quick and easy as possible for you.

This questionnaire is designed to pinpoint areas of focus to optimize building a 21st century practice. It can help you to make use of the simplest and most effective strategies available to you, particularly in cyberspace.

10 Essential Elements For Your Success

This questionnaire builds on 10 keys that are essential elements for your success:

1. **Focusing on the big picture and creating a big dream**
2. **Developing an entrepreneurial spirit**
3. **Creating a positive marketing reality**
4. **Focusing on a well-defined niche (specialty)**
5. **Taking control of your time**
6. **Overcoming the showstoppers**
7. **Creating a contact list**
8. **Developing an effective marketing message**
9. **Creating an internet presence**
10. **Writing a newsletter/blog**

Of course, we all know that every practice is different. Some of these areas may not apply to your business. Nonetheless, the questions in each of these 10 categories will help you to hone in on essential elements to pursue. Focusing in on these essential elements can lead you to make more rapid progress and catapult your business into the 21st Century with use of the many opportunities that are now available to create a global business and potentially touch thousands of lives.

2. Diagnostic Questionnaire

The following questionnaire provides a series of areas and questions to consider as you build your business. It is oriented toward holistic practitioners, as this is our area of expertise, but the questions apply equally well to any small business.

This is the questionnaire we use to help our private clients to become clear on what is hanging them up and what they need to do to create the success they desire. The questions are designed to help you to explore the puzzle pieces for building a thriving holistic practice and to determine your next steps. It will help you to pinpoint areas of focus to optimize building a 21st century practice, particularly in cyberspace, where opportunities abound.

We have done extensive research and implementation and continue to follow the most current trends. Our aim is to pass our expertise on to make things as quick and easy as possible for you.

We know some people may wish to go further with this diagnostic and we discuss how to do this at the end of the questionnaire.

How to use the Questionnaire

Reading through the questions on the following pages should provide some insight. The greatest value, however, will come from putting your responses in writing. This is what we recommend. Writing has a way of making things real and brings the clarity you may need to take your next steps effectively.

To make this easy for you, we have created a word document with the full questionnaire available for you to download at <http://heartandsoulofsuccess.org/diagnosis.doc>. Just right click on this link and choose “save as.”

Overview Questions

Please complete your responses to the following:

- What is your business/professional background?
- Describe your holistic practice (your services and offerings). As a note, it's fine to use this questionnaire even if you are just starting out. It will help you to get off to a good start.
- How long have you been doing it? How many hours do you put in a week?
- In what areas of your practice do you feel are most successful? Please explain briefly.
- What are your financial goals for your practice? Where are you currently?
- How confident are you in your ability to deliver results to your clients?
- Evaluate each of the following items between 1 and 10:
 - _____ Connection with inner wisdom as your guide
 - _____ Connection with life purpose
 - _____ Money/abundance
 - _____ Financial stability
 - _____ Self esteem/confidence
 - _____ Self-empowerment
 - _____ Marketing skills
 - _____ Charging the fees you deserve/desire
 - _____ Receiving the recognition you deserve/desire

The 10 Keys

Now, evaluate each of the 10 keys and answer the questions below each one.

1. **Focusing on the big picture and creating a big dream:** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____

Key: Having a dream that's worth pursuing, thinking big rather than "just getting by." This is the best place to start. Creating a clear picture of the life you desire helps you to stay focused and moving in the right direction.

- What are your greatest gifts and talents that bring you the most joy? This is your "brilliance zone" and a big key to your purpose.

- What, if anything, do you understand your purpose to be?
- How committed are you to realizing your purpose? Explain briefly.
- Ideally, how many hours do you want to work a week?
- Location – What percentage of your business is/ or do you want to be (note current percentage and desired percentage):
 - Internet-based:
 - Local:
 - Traveling (such as seminars or speaking):
- Do you have or want a home-based business or an office? Explain.

2. **Developing an entrepreneurial spirit.** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____

Key: Becoming a prosperous holistic practitioner usually requires a mindset shift. This often involves shifting from an employee mindset to an entrepreneurial mindset. Intend to reach more people and have a greater impact by embracing the qualities itemized below.

- Evaluate where you are now with each of the following from 1 to 10 (with 10 being your ultimate goal):
 - _____ Knowing and valuing yourself
 - _____ Willingness to invest in your success
 - _____ Confidence and decisiveness
 - _____ Ability to enthusiastically promote yourself
 - _____ Ability to be strategic
 - _____ Open-mindedness and flexibility
 - _____ Self Reliance and independence
 - _____ Having a support system
 - _____ Perseverance
 - _____ Spontaneousness and being in the flow

3. **Creating a positive marketing reality.** First note on a scale of 1 to 10, (with 10 being the ultimate goal) where you are now in this area: _____

Key: To succeed, you need to enjoy what you are doing, especially marketing. Marketing is essentially getting your message out and we know you want to do this. So make helping people, what you want to do most, the heart of your marketing ap-

proach. In your marketing, touch each person you encounter in a positive way that makes you feel good about what you are doing.

- How do you feel about marketing your practice? Explain briefly.
- What, if anything, do you perceive to be holding you back from creating a positive marketing reality?

4. **Focusing on a well-defined niche (specialty).** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____

Key: You can't be everything to everyone. "Tuning in" to your greatest gifts and desired market will save you enormous time and energy by knowing who to contact and how to get your message across effectively.

- Do you have a niche (specialty) and, if so, what is it?
- Who are your ideal clients?
- What specific problems do you help clients to solve?
- Who do your products and services attract?
- Where do you find your best clients?

5. **Taking control of your time.** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____

Key: A strategic approach is a must. Most people need to create time to reach their goals and build their practices effectively.

- The ways you spend your time may be viewed as reflections of what is most important to you. How accurately does the way you use your time currently reflect what you consider to be most important to you? Explain briefly.
- What areas do you most need to examine to take control of your time?

6. **Overcoming the showstoppers.** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____

Key: Realize that pursuing your dreams will bring up all of your fears and excuses for why you can't do it. Assume an "I Can" attitude and clear away the obstacles. Also, don't wait for all the fears to go away before you take action. Know that clearing obstacles is an integral part of your journey to wholeness.

- What are your 2-3 greatest fears or reservations about building your practice? Please explain briefly.

- What methods do you use to address your fears, issues, or concerns?
 - How effective are these methods?
7. **Creating a contact list** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____
- Key:** You need to have a list of prospects in your niche and keep adding to it.
- Do you have a list? If so, how many people are on it?
 - Where do people find you who join your list?
8. **Developing an effective marketing message.** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____
- Key:** Let your prospects know how you can help them rather than describing the process you use (like EFT or coaching). Your prospects are interested in solving their problems. This is what will draw them to you and why they will want to pay you.
- Briefly describe your current marketing strategies.
 - How confident are you in your marketing message?
 - What are some of your successes and shortcomings? Please explain briefly.
9. **Creating an internet presence** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____
- Key:** Success for a home-based business is generally created with a blog/website. This is a common stumbling block for holistic practitioners. The good news is that you can do this easily with new technology.
- Website URL (if you have one)
 - How well is your website working for you?
 - If you don't have a website, do you want one and why or why not?
10. **Writing a newsletter/blog.** First note on a scale of 1 to 10 (with 10 being the ultimate goal), where you are now in this area: _____
- Key:** These are both great ways to help people to make positive changes and get to know you at the same time. These approaches can be creative, and rewarding, even for non-writers.
- Do you currently have a newsletter? If so, describe its focus and how it fits into your strategy for success.

- Do you currently have a blog? If so, describe its focus and how it fits into your strategy for success.

Your Next Steps

Having completed questions and received insights in each of the 10 essential areas, the key now is to develop an action plan for success.

- What do you perceive to be the 3 biggest challenges you face right now?
- What, if any, support system do you currently have in place?
- If you could resolve your concerns, what would your practice and your life be like one year from now?
- From 1 to 10, how important is it to you to make this vision a reality and why?
- How willing are you to do what it takes to succeed? Explain.
- What would you most like help with?

Here is a reminder, in case you missed it. To make it easy for you to put responses to the questions in writing, we are making a word document with the full questionnaire available for you to download at <http://heartandsoulofsuccess.org/diagnosis.doc>. Just right click on this link and choose “save as.”

3. Taking Action

Ultimately, success is a matter of putting what you learn into action. As Ralph Waldo Emerson said, “Don't be too timid and squeamish about your actions. All life is an experiment.” So experiment freely... and strategically.

With this in mind, we also want to leave you with a few more essential bonus tips.

1. **Spend as much time as possible in your “brilliance zone.”** You are here to be your personal best and you can set yourself up for greater success, joy, and fulfillment by focusing in on areas that allow you to be “in the zone” most of the time. This also means minimizing the time you spend out of the zone.
2. **Be strategic.** Once you identify the fastest and easiest way to get where you want to go, eliminate anything you are doing or thinking of doing that deviates from your strategy. There may be a lot of things you envision doing.

A common mistake many holistic practitioners make is dabbling, doing a little here and a little there, without a clear direction. This doesn't work. You need to stay focused on how each piece fits into the big picture to get the best possible results. This questionnaire should help you to identify your next step.

As you progress, look at everything you do in relation to the whole picture and target your ideal client. It's easy to get excited about each new idea that comes along, but if your message wanders from one thing to the next, prospects will become confused and go elsewhere. Make sure that everything you do, write, or offer to lead potential clients toward specific services or products aims directly at the target.

3. **Find a support system.** Be sure to take opportunities to collaborate. It is essential to be around people who support you in realizing your dream. The more the better. If you are a member of the International Association of Holistic Practitioners, which you can find at <http://heartandsoulofsuccess.org>, you're off to a good start. Successful people partner up with others to mutually support their dreams and goals. Association members can go to the members' area on the website to explore opportunities to interact and co-create.
4. **Do something.** Remember, if you are waiting for the perfect time to start, it may never come. It's better to just do something now and aim directly for your goal.

Some final reminders:

- **Take one step at a time.** Yes, many people become overwhelmed with all the possibilities. This is one of the reasons we created this questionnaire . The questions can help you to identify steps that you can take to produce the results you desire. While there may be several areas where you want to take action, doing one thing at a time and doing it well will allow you to create a sound structure for your practice.
- **Prioritize.** Immediately identify a few things you can do that will allow you to make the greatest progress in the least amount of time and with the least amount of effort, so you can start to experience success right away.
- **Watch for resistance.** Expect fears and limiting beliefs to surface. This is part of the process and we recommend having strategies in place for overcoming them when they arise. Above all, believe in yourself and your dreams. You are here for a reason and you have something special to contribute to the world.
- **Be persistent and flexible: don't give up.** Things probably won't happen the way you think. Miracles can happen and situations that arise can challenge you to expand and grow. If you have a dream and a purpose, your next step will become clear as you progress. A favorite quote from our good friend Sheila Hollingshead is, "There is no such thing as failure – just giving up too soon." Keep your dream alive, open to the infinite and beautiful things will happen to you.

One of the saddest things we see is when people try a couple of things, then when they encounter an obstacle, which inevitably happens, they give up. Giving up is not an option if you are doing what you came here to do, the thing that makes you feel most alive. There is only the next step forward and the people who persevere are the ones who reap the rewards both in terms of outer success and inner fulfillment.

4. Following Up

Remember, as you take your next steps that your dreams and goals are worth it!

It's more important now than ever to get a solid foundation for creating and marketing your practice. What you invest in today will directly affect the results you get tomorrow.

The following are opportunities to go further on the path with us and receive support for creating the thriving practice you desire.

International Association of Holistic Practitioners (IAHP)

Most successful entrepreneurs will tell you that you will grow proportionally to the people you surround yourself with. We created IAHP, the International Association of Holistic Practitioners, to provide a community where Holistic Practitioners can connect with “the heart and soul of success” and create thriving professional practices. Find out more at <http://heartandsoulofsuccess.org/benefits>.

Private Diagnostic Session with Phillip or Jane Mountrose

Want more clarity and confidence?

Want a personalized action plan to help you to create the prosperous practice you desire?

As with a car diagnosis, an accurate assessment of your practice from a caring person who has gone where you want to go can tell you what you need to get running “on all cylinders.”

We share their expertise drawn both from our years experience in the field, as well as from extensive research into proven strategies for success. We can help you to avoid the pitfalls we and others have fallen into and to capitalize on the things that have and,

even more importantly, are currently working in this fast-changing field. Find out more at <http://gettingthru.org/aconsult.htm>.

Along with the Diagnostic Session, we can also share ways to go further with our coaching and mentorship, if desired.

Audio Program: *How to Market Your Holistic/Spiritual Practice*

This easy-to-use Audio Program is a perfect follow-up to this diagnostic questionnaire. It's a comprehensive program that provides key ingredients to success and prosperity for anyone who has a practice or may have one in the future. In either case, this program will definitely accelerate your growth. Even learning a few of the tools or insights could totally transform your practice.

This program provides more information about many of the areas covered in this questionnaire. As you have likely seen, we have a keen sense of where you might be coming from as we have faced many obstacles over the years in building a successful holistic/alternative practice. But we knew our dreams and goals were worth it, and discovered some important keys to success.

To find out more, just go to <http://gettingthru.org/hminvite.htm>.

5. About the Authors



Dr. Phillip Mountrose and Dr. Jane Mountrose are the founding directors of the International Association of Holistic Practitioners (IAHP), <http://heartandsoulofuscess.org>. They have devoted nearly two decades to exploring the fields of personal and spiritual development and building a successful holistic practice. Their passion in life and greatest joy revolve around helping people to overcome personal challenges, discover their life purpose, and create tremendous success.

Phillip and Jane have created fabulously successful and fulfilling lives for themselves, but it wasn't always this way. Earlier in life, Jane was an architect and Phillip was a special education teacher. While they were successful in these areas, their deep interest in personal and spiritual growth drove them forward to learn more about building a successful practice and overcoming the blockages that prevent people from becoming successful holistic practitioners.

Since 1992, the Mountroses have taught courses in holistic coaching and healing in California. They are also featured speakers at conferences and events throughout the United States. Recently, they converted their premier training into an extensive Coaching and Healing Certification Telecourse Program helping students around the globe to develop skills and market their practices.

The Mountroses have also written a dozen books and manuals that are sold worldwide. They are most widely known for their groundbreaking work with EFT (Emotional Freedom Techniques) and energy healing. Also included in these publications is a holistic marketing program that uniquely blends spiritual awareness with 21st century success solutions, drawing on their own extensive research and experience. They've learned many things to avoid, potentially saving members years of trial and error. They also mastered how to optimize success both locally and worldwide with an internet-based practice.

Now, through IAHP, Phillip and Jane share a treasure chest of these 21st century enlightened success solutions to help holistic practitioners like themselves who yearn to get their messages out to the world. In addition to the Mountroses' expertise, members have access to a carefully selected group of leading experts in the field and a wealth of resources.

The Mountroses live on the sunny Central California coast.