



OPTIMIZED INTEGRATIVE HEALTH



BUSINESS SOLUTIONS PROJECT

OLENTANGY HIGH SCHOOL
675 LEWIS CENTER ROAD
LEWIS CENTER, OHIO 43035
ANIA WHITACRE
APRIL 8, 2025

Table Of Contents

I. Executive Summary	1
II. Initiating	4
A. Statement of the Problem	
B. Project Scope	
III. Planning and Organization	6
A. Project Goals	
B. Human Resource Management Plan	
C. Schedule	
D. Quality Management Plan	
E. Risk Management Plan	
F. Proposed Project Budget	
IV. Execution	11
V. Monitoring and Controlling	16
A. Monitoring	
B. Controlling	
VI. Closing the Project	17
A. Evaluation of Key Metrics	
B. Lessons Learned	
C. Recommendations for Future Projects	
VII. Bibliography	19

I. EXECUTIVE SUMMARY

1

Introduction of Business

Optimized Integrative Health is a personal training and nutrition coaching business, located in Powell, Ohio. Owned and operated by Lisa Shepherd, Optimized Integrative Health focuses on meeting clients' goals relating to general fitness, athletic performance and weight loss.



Statement of the Problem

1. Inability to communicate with target market
 - No website
 - No social media
2. New clientele relies on word-of mouth
 - No promotional activities implemented
 - No marketing tactics executed
3. Stagnant growth
 - Low level of new interest
 - Minimal new leads
4. Lost potential profits
 - Inability to solve other problems
 - Lack of business expansion

Purpose

- 1 Increase communication
- 2 Implement promotional activities
- 3 Business growth

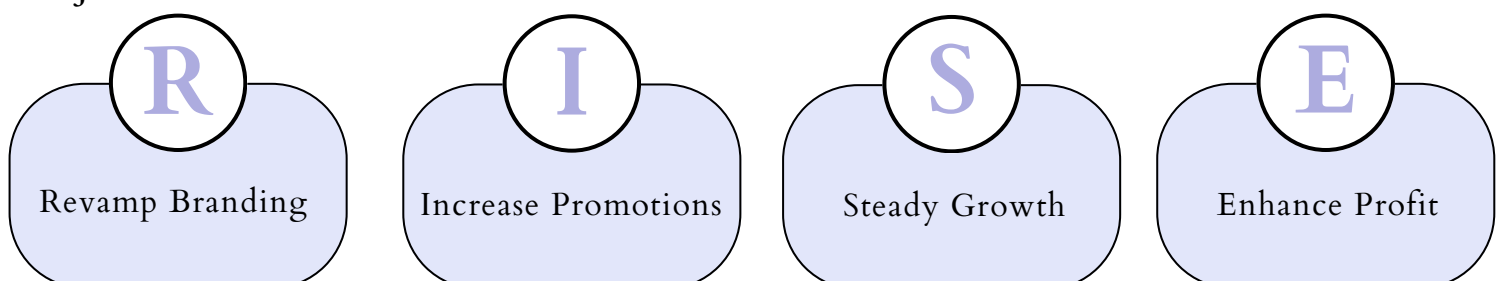
Rationale

The needs and goals of the business will be discussed and met through the activities executed within the campaign. Once these goals are met, the overall business will see improvements. This will lead to the ability to **transition Optimized Integrative Health from a side business to primary business.**

Expected Benefits

Improve Communication and Exposure <ul style="list-style-type: none">• Build brand image• Educate target market	Increase Number of New Leads <ul style="list-style-type: none">• Inform market about services offered• Increase interest of the target market	Increase Profit <ul style="list-style-type: none">• Implement promotional strategies• Profit increase of 50%
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Project Goals



I. EXECUTIVE SUMMARY

2

Human Resource Management Plan



Ania Whitacre
Project Manager



Lisa Shepherd
Owner of
Optimized Integrative Health

Milestones and Timeline

Research

- Conduct client meeting
- Research target market
- Website development

Planning

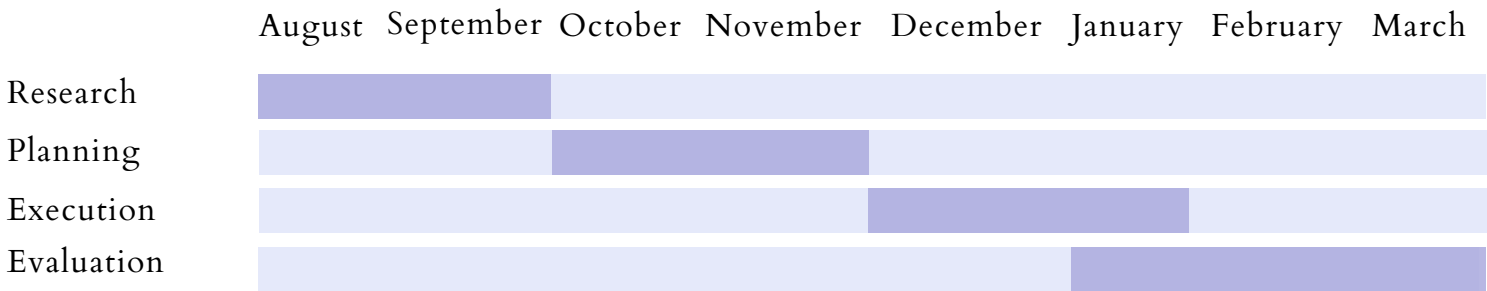
- Plan promotional events
- Create social media content
- Identify key performance indicators

Execution

- Website launch
- Nutrition seminar
- Holiday promotion
- Business collaboration

Evaluation

- Website interactions
- Social media growth
- New leads
- Profit increase



Quality Management Plan

Key performance indicators to measure the success of the project.

Website Interaction	Social Media Growth	New Leads	Profit Increase
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Risk Management Plan

Issues	Impact
Personal Scheduling Conflicts	→ Decreased Income
Technical Difficulites	→ Lack of communication and resources

Budget

Activity	Cost
Nutrition Coaching Seminar	\$300
Website Subscription	\$60
TOTAL BUDGET	\$360

I. EXECUTIVE SUMMARY

3

Execution



Monitoring

Project manager monitored the project by using a shared calendar for upcoming events and social media post dates. Frequent meetings with Mrs. Shepherd were conducted to discuss concerns about current and future events.

Controlling

To control the execution of events, project manager researched different platforms for website building and social media, and adjusted campaign plans when abrupt schedule changes occurred.

Evaluation of Key Metrics

Website Unique Visits	240	Social Media Views	8.7k
Total New Clients	28	Total Profit Increase	563%

Lessons Learned

Initiating: Obtaining data about the business, to prevent delays in planning.	Planning & Organizing: Prepare for the possibility of scheduling conflicts during promotional periods.
Execution: Remain on schedule with website development deadline.	Monitoring & Controlling: Receive and use analytic details from the website portal about views and visits.



Recommendations for Future Projects

 Addition of Calendar on Website

 Greater Budget Flexibility

 Alternative Promotional Channels

II. INITIATING

4

A. Statement of the problem

Optimized Integrative Health is a personal training and nutrition coaching business, located in Powell, Ohio. Optimized Integrative Health is owned and operated by Lisa Shepherd. The business focuses on meeting clients' goals relating to general fitness, athletic performance, and weight management through personalized nutrition and training programs. Personal training sessions are held at Zone Personal Fitness, and nutrition coaching meetings are online via Zoom. By offering both online and in-person resources, Optimized Integrative Health can meet clients' needs anywhere.

1

Inability to communicate with target market

Optimized Integrative Health does not have a website or business social media accounts, causing the inability to communicate with the target market. Without communication with the market, brand image and visibility are at a minimum.

2

New clientele relies on word-of-mouth

Due to the inability to communicate with the target market, obtaining new clients relies solely on word of mouth and referrals. This poses a threat to expanding to a larger market and generating new leads.

3

Stagnant growth

Without communication to the target market or promotional strategies implemented, Optimized Integrative Health has stagnant growth. The inability to inform the market about services offered causes business potential to be hindered. The current number of clients is 5 personal training and 3 nutrition coaching.

4

Lost potential profits

Each of the above problems leads to a lost potential profits, putting the entirety of the business at risk.

As a result of the problems listed above, there is hesitation to make the transition of Optimized Integrative Health from a side business to a primary occupation. The business is currently a side business due to stagnant of growth. Solving each of the problems above will benefit the overall wellbeing of the business and allow for it to transition to full time employment.

II. INITIATING

5

B. Project Scope

Focusing on building brand awareness will allow an increase in clientele, leading to increased profit. These goals will be met through a variety of activities including business collaborations, social media promotions, seminars and other promotional elements.

Purpose

Increase communication

Increasing communication through the development of the website and social media accounts will build brand image.

Implement promotional activities

Executing promotional activities geared toward both personal training and nutrition coaching will work toward informing and persuading the target market.

Opportunity for business growth

With the implementation of the website, social media, and promotional activities, the business will have the opportunity to grow in quantity of clients. This will cause profits to increase.

Rationale

The needs of the business and current problems were discussed with the owner prior to starting the project. Without addressing the problems, the business will be unable to thrive. Working within the parameters set by the business, the campaign is being carried out to solve these problems. This will provide the opportunity for business growth and the ability to transition from a side job to a primary, full time business.

Expected Benefits

Establish Brand Image

Brand image is not currently established. Improving exposure will be met through the creation of the website, development of social media accounts and frequent posting.



Increase Number of New Leads

The activities focusing on communication will inform the market. This will increase interest, resulting in a generation of new leads.



Profit Increase

New leads will naturally increase when promotional elements are implemented, leading to increased profit.



A. Project Goals

The campaign goals are S.M.A.R.T. (specific, measurable, achievable, relevant and timely), ensuring they are the primary focus. Each of the goals within the R.I.S.E. campaign work directly toward solving the current problems the business is facing.

R **Revamp Branding**
The first goal of the campaign is to revamp branding. By improving communication through creating a website and social media, the business will be able to inform the target market about services offered and promotions taking place. This will develop brand image, increase brand exposure and improve search engine optimization.

I **Increase Promotions**
Increasing promotions will allow the business to expand to a broader target market. Through implementing new marketing strategies, potential clients will be encouraged to sign up for a personal training or nutrition coaching plan.

S **Steady Growth**
Turning stagnant growth into momentum is the third goal of the campaign. This is a necessary step to take place to be able to transition the business from a side business into a primary business. Steadying growth will be met through the implementation of promotional strategies and revamping branding.

E **Enhance Profits**
The goal of enhancing profits will be a metric to measure the overall success of the project. It will also measure the prosperity and growth of the business resulting from the activities implemented.

Each goal is dependent on the prior goal, causing a chain reaction. **Revamping branding** will assist in building the business's image so it can be more recognizable to the public.

Implementing new promotional activities will lead to **increasing clientele**. This will lead to a **rise in profit**. Each activity within the campaign will strategically work toward meeting these objectives.

III. PLANNING AND ORGANIZING

7

B. Human Resource Management Plan

The project manager held responsibilities for the preparation, planning, and execution of activities that took place. During the preparation phase, meetings with Mrs. Shepherd were held to discuss goals, activities, and metrics during the campaign. Throughout the campaign, the project manager evaluated the efficiency and effectiveness of the activities, making adjustments where necessary. When the campaign ended, outcomes, benefits, and key metrics resulting from the activities that took place were analyzed by the project manager. Specific responsibilities and strengths are highlighted below.



**Ania Whitacre,
Project Manager**

Responsibilities:

- Website creation and development
- Direct communication with business
- Event coordination
- Social media management
- Target market data collection/market segmentation

Strengths / Skills:

- Problem-solving
- Interpersonal communication
- Creativity
- Attention to detail
- Organization



**Lisa Shepherd, Owner of
Optimized Integrative Health**

Responsibilities:

- Communication with project manager
- Provide information about the business
- Plan future promotional events
- Operate website after initial launch
- Manage social media after campaign

Strengths / Skills:

- Effective communication
- Knowledgeable about industry

III. PLANNING AND ORGANIZING

8

C. Schedule

i. Milestones

Identifying milestones keeps the project on track and allows for the objectives to be the main focus throughout the entire campaign.

Milestone 1: Research - August and September

Milestone 2: Planning - October and November

Milestone 3: Execution - December and January

Milestone 4: Evaluation - January - March

ii. Timeline to reach milestones

Research	August				September			
	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
Discuss Business Goals								
Identify Target Market								
Explore Ways to Communicate with Target Market								
Search Website Hosting Options								

Planning	October				November			
	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
Plan Promotional Events								
Create Facebook Account								
Develop Website								
Design Social Media Content								
Identify Key Performance Indicators								

Execution	December				January			
	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
Optimized Integrative Health Website Launch								
Nutrition Coaching Seminar								
Holiday Sales Promotion								
Life Family Chiropractic Business Collaboration								
Social Media Marketing Strategy								

Evaluation	January				February				March			
	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
Assess Website Activity												
Evaluate New Nutrition and Personal Training Leads												
Analyze Social Media Growth												
Calculate Profit Increase												

Transition	February				March			
	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
Turnover of all Business Responsibilities								

III. PLANNING AND ORGANIZING

9

D. Quality Management Plan

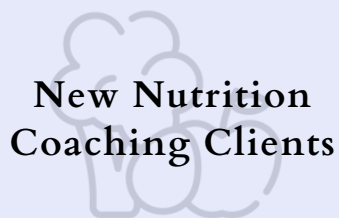
The quality management plan outlines the various key performance indicators, measuring the success of the activities executed. Below is a description of the key performance indicators, and specific goals aiming to be met within each metric. If these goals are met, the project will have proven to be successful, having achieved the campaign goals.



The growth of the website will be a metric used to measure the success of revamping branding. The two features being measured within the website launch are the creation of the website, and interactions received.



The primary step in social media growth is establishing social media accounts on both Facebook and Instagram. Social media expansion will be measured through account and content views. This will be met through an increase in the frequency of posting to 1 post per week.



Through the Nutrition Coaching Seminar and Life Family Chiropractic Partnership, the target market will be informed about what the business offers. Prospects will have the opportunity to sign on for a customized nutrition program at a reduced rate. Through these activities, the number of nutrition coaching clients will increase from the current number, which is 3.



The Holiday Sales Promotion works toward reaching new clientele and broadening the target market. Since the 2-week promotional package includes one free personal training session, potential clients are inclined to sign on for a personal training program. This works toward the goal of increasing clientele. As a result of this promotion, personal training clients will increase from the current number of clients, which is 5.



The goal of a 50% profit increase will be met through all of the activities within the project. Brand awareness will expand through the use of social media and the website launch. Clientele will increase through the Nutrition Coaching Seminar, Holiday Promotion, and Business Partnership. Each activity is working toward increasing profit.

III. PLANNING AND ORGANIZING

10

E. Risk Managment Plan

Potential Issues	Impact of Issues
Personal Scheduling Conflicts <ul style="list-style-type: none">Personal time offIllness	The business is owned and operated by one individual, making scheduling conflicts a large risk. Scheduling conflicts lead to fewer appointments taken, leading to decreased income.
Technical Difficulties <ul style="list-style-type: none">Social media developmentBusiness website	Technical difficulties can cause a lack of communication and resources for the client. This can cause miscommunication between the provider and client, portraying an unprofessional brand image.

Response Strategy

Personal Scheduling Conflicts:

Ensuring there are minimal scheduling conflicts during promotional periods is one strategy used throughout this project. Maximum availability to meet clients' scheduling needs is crucial when working toward the goal of increasing clientele. Confirming that Mrs. Shepherd has availability in her schedule for new clients before implementing promotional activities was one strategy used to combat this risk.

Technical Difficulties:

Technical difficulties are commonly unavoidable, but preventative actions were implemented to address this risk. Leaving ample time to develop the website and construct social media posts was a strategy used. This allowed extra time for the possibility of technical difficulties, minimizing the risk of delays during the execution phase.

III. PLANNING AND ORGANIZING

F. Proposed Budget

Activity	Description	Cost
Nutrition Coaching Seminar	Cost for the rental space for the nutrition seminar. This seminar is targeting the goals of improving communication and increasing clientele.	\$300
Website Subscription	Annual subscription cost for the website. The new website is going to increase communication and build brand imagery.	\$60

TOTAL BUDGET

\$360

Revamp
BrandingIncrease
PromotionsSteady
GrowthEnhance
Profits

Social Media

Social media accounts for the business were created during the planning phase of the project. Posts were made to promote the activities taking place and to inform the market about the business.

Instagram / Facebook Posts



- Increased visibility within the algorithm
- Posts with a focus on informing the market
- Content to promote events throughout the campaign



- Weekly posts during execution phase
- Growth through use of Hashtags
- Ability to invite collaborators to maximize business exposure

The creation of social media accounts and frequent postings are working toward revamping branding and increasing communication between Optimized Integrative Health and the market.

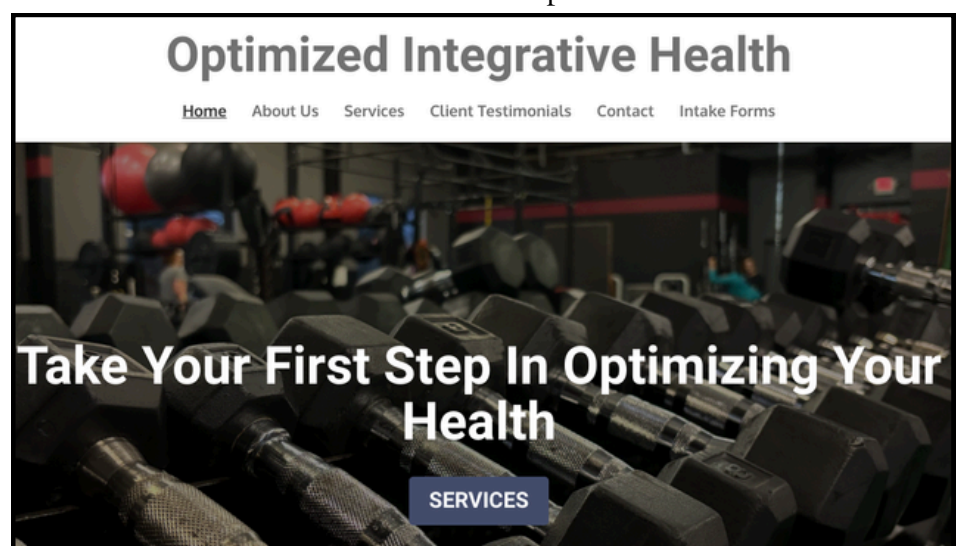
Increase Exposure

Channel of Communication

Build Brand Image

Website Launch - December 1, 2024

After researching various website platforms (Square, Tok, Wix), Webador aligned closest with the needs and budget of the business. The website was constructed during the planning phase, and the website launch took place on December 1, 2024. The website launch was promoted on Instagram and Facebook, providing a direct link for viewers to click. The website provides the market with information about the services offered. It also has a contact page for prospects to reach out with questions or submit an inquiry. The website is used as a portal of communication, containing information about activities taking place within the campaign. Combining all of these aspects works toward revamping branding.



Nutrition Coaching Seminar – December 7, 2024

Optimized Integrative Health hosted a nutrition coaching seminar to inform prospects about the nutrition coaching services offered. This event was free to attend and was led by Lisa Shepherd, Certified Precision Nutrition Coach and Integrated Health Practitioner. Those who attended were informed and given an opportunity to sign on for 20% off a customized nutrition program.

50	Attended
255	Post Views
\$1,000	Projected Profit
5	Sign Ups

This event had 50 people in attendance. As a result of the seminar, 5 people signed on for a nutrition program. The projected profit from the new clients that signed on from this event is \$1,000. This activity is working toward the goals of increasing clientele and profitability.



Instagram and Facebook Promotional Post
November 23, 2024



The nutrition coaching seminar was promoted on both Instagram and Facebook. Information relating to where and when the event was held was provided with a registration link. This event reached the target market, allowed for communication between the business and client, and was a promotional strategy to work toward the goal of increasing clientele.

Holiday Promotion – December 15 – 28, 2024

From December 15–28, Optimized Integrative Health hosted a personal training holiday promotion, offering a free personal training session with the purchase of a one-month package. These sessions can be customized to fit individuals' specific needs, focusing on clients' unique behavioral habits and fitness goals, helping to boost physical health.



Instagram and Facebook Promotional Post
December 15, 2024

282

Post Views

5

Sign Ups

\$2,800

Projected Profit

This event worked toward the goal of revamping branding through communication and activity on social media. It also worked toward steadying growth by increasing clientele with the usage of a sales promotion. Increased profit was a result of meeting the other two objectives through this promotion.

Promotional Elements Implemented:



Website Infographic



Instagram and Facebook Promotional Post
December 25, 2024

This activity was promoted on Instagram and Facebook. A direct link to the website was included in posts. The website contained more information about the Holiday Package and a contact form, allowing for optimal communication between the business and client.

Life Family Chiropractic Business Collaboration – January 1 – 14, 2025

During this event, prospects had the opportunity to sign on for a custom nutrition program at a reduced rate. This collaboration was in partnership with Life Family Chiropractic, which was offering a discounted chiropractic care consultation with Dr. Richard Shepherd. Clients were able to meet individual health goals through this business collaboration.

450	Post Views
3	Sign Ups
\$600	Projected Profit

Identifying consumer behavior during the time around the new year was one tool used in the planning period of this partnership. This business collaboration worked to inform the target market. During this time period, a larger market can be reached with promotional elements implemented from both businesses. The social media posts reached 450 people. This collaboration generated 3 new leads and \$600 of profit.



Instagram and Facebook Promotional Post
January 1, 2025

Promotional Elements Implemented:



Instagram and Facebook Promotional Post
January 11, 2025



Website Infographic

Instagram and Facebook posts were created, informing the market about this collaboration. Posts included a direct link to the website, providing additional information about this event. The website had a contact form for easy communication between the business and the market. This event led to the generation of new leads, which in turn led to increased profit.

Transfer of Operations to Client

The social media accounts and website were turned over to be run and operated by Optimized Integrative Health. Due to the established accounts and following, the business will have continued success utilizing social media as a communication tool with the market. Below are the specific responsibilities transferred to the business.

Element	Future Impact
Website <ul style="list-style-type: none"> Website operations New lead inquiries Promotional features 	After constructing the website, all aspects were transferred to Mrs. Shepherd. As an established portal of communication, new growth can continue to develop.
Social Media <ul style="list-style-type: none"> Frequent posts Promotional reels Communication with market 	Social media accounts and a steady following have been established during this campaign. The business can continue to communicate effectively to the target market moving forward.
Promotional Events <ul style="list-style-type: none"> Planning Executing Evaluating 	All aspects of future promotional events will be conducted by the business. The promotional events implemented during this campaign have initiated opportunities for future success.

Business Growth After Campaign

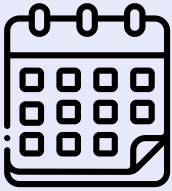
Website Growth Total Unique Visits: 240	Social Media Growth Content Views: 8,790
Clientele Increase New Clients: 28	Profit Increase Profit Increase: 563%

Measuring the above metrics displays that the goals of the project were met. Through revamping branding and increasing promotional strategies, both clientele and profit increased. Growth has been measured during the campaign in the months following. This growth is projected to continue as marketing elements and strategy are turned over to Mrs. Shepherd.

V. MONITORING AND CONTROLLING

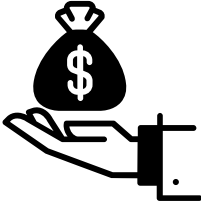
16

A. Monitoring



Schedule:

Along with adjustments to the campaign activity schedule, the social media schedule was regularly updated with new content post dates. Changes were discussed with Mrs. Shepherd on a shared calendar and were aligned with the campaign objectives. These adjustments were checked weekly to ensure time management and punctuality of posts.



Budget:

Throughout the campaign, additional potential expenses were discussed during weekly meetings. Depending on which service gained clientele, the project manager calculated the expected profit to monitor and ensure the return on investment was positive.



Project Quality:

Project quality was managed by monitoring social media content, receiving feedback from Optimized Integrative Health, and quality event preparation. Social media content was approved by Mrs. Shepherd and the project manager to ensure that the quality meets the business's standards and expectations while working toward the objectives of the R.I.S.E. campaign.

B. Controlling

Problems	Solutions
Scheduling Conflicts	Mrs. Shepherd was unavailable for several days during the campaign due to personal scheduling conflicts. Clients were given a variety of online resources during her absence to prevent profit loss.
Website Development	Website research was executed on various builder platforms, such as Wix, Tok, and Square. Their prices and functionality were considered to determine one that was user-friendly and could create an efficient layout.
Communication with Business Partnership	In-person meetings were held with owners of Optimized Integrative Health and Life Family Chiropractic to discuss partnership details. A shared schedule was provided with dates and information to avoid miscommunication.
Low Search Engine Optimization	The website was published, expanding the business's exposure, and social media activity increased visibility. Keyword searches allow for prospects to easily discover Optimized Integrative Health.

VI. CLOSING THE PROJECT

17

A. Evaluation of Key Metrics

R
I
S
E

Goals

Metrics

Revamp Branding

- Success of website launch (website views, interaction, inquiries)
- Social media interaction

Increase Promotions

- Implementing various promotional events
- Promotional posts on social media

Steady Growth

- Increase number of nutrition coaching clients
- Generate new personal training leads

Enhance Profit

- Profit increase of 50% compared to months prior
- Positive return on investment

Website Growth

240 Unique Visits

The website gained 240 unique visits. This helped **improve customer interaction** by being a communication portal, informing potential clients about services, future events, and activities.

Social Media Growth

8.7k Content Views

The activity posted on Instagram and Facebook generated 8,790 views. This **increased engagement and visibility, improving the business's branding.**

Clientele Increase

28 New Leads

As a result of the campaign, Optimized Integrative Health **gained a total of 28 new clients**, 14 for nutrition coaching and 14 for personal training. This metric provides evidence that the promotional events were successful in generating new leads, which led to an increase in profit.

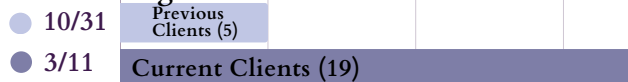
Profit Increase

563% Profit Increase

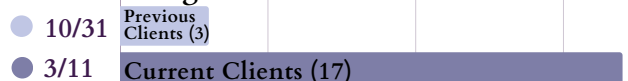
The profit for the 4 month period prior to this campaign totaled \$1,120. There was \$4,800 of projected profit directly resulting from the activities executed. During the months following, an additional \$2,620 of profit was generated, displaying continued growth. **As a result of the campaign, the total profit generated was \$7,420 and profit increase was 563%.**

Clientele Before and After Campaign

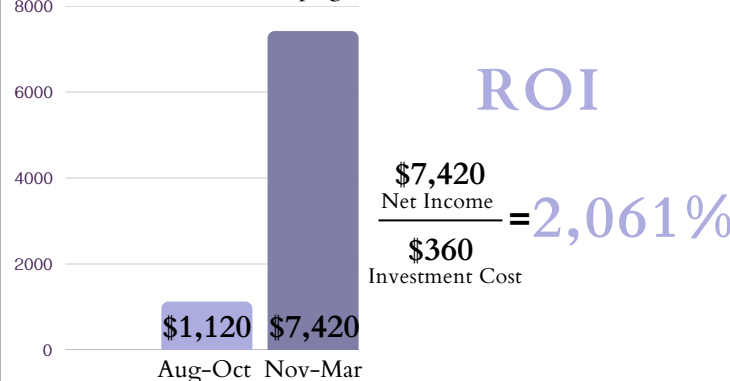
Personal Training



Nutrition Coaching



Profit Before and After Campaign



VI. CLOSING THE PROJECT

18

B. Lessons Learned

STRENGTHS

WEAKNESSES

INITIATING

- Finding business's areas for improvement and growth
- Clear vision of purpose and goals

- Obtaining data from the business during the research phase, causing delays during the planning and organization stage.

PLANNING & ORGANIZATION

- Created a clear and detailed plan with project goals, R.I.S.E.
- Accurate budget and financial constraints.

- Prepare for the possibility of potential scheduling conflicts during promotional periods.

EXECUTION

- Implemented promotional events and activities with direct communication to the target market.

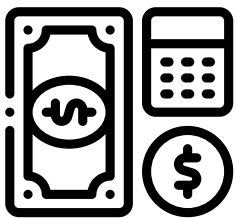
- Remaining on schedule with website development amidst difficulties with technology and design.

MONITORING & CONTROLLING

- Accessing social media and profit data to analyze growth and identify potential issues.

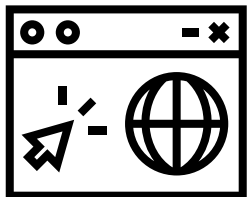
- Complications with receiving metrics from the website portal about views and visits.

C. Recommendations for Future Projects



Greater Budget Flexibility

While social media and the website launch were effective in reaching and improving engagement, there are more opportunities with a greater budget. Having greater flexibility would allow the project to produce a higher quality website with more analytic details and allow social media have a greater impact by boosting promotional content.



Including Calendar on Website

Although the website became an effective portal of communication between clients and the business, there is no schedule for the clients to see appointment availability. Adding a calendar to the website will reduce administrative workload and improve customer experience by offering convenience and clarity.



Alternative Channels of Promotion

Social media is a great tool to reach many potential clients and increase brand exposure. However, using alternative channels such as local newspapers, ads, or flyers would diversify marketing efforts and reach a demographic that may not be active on social platforms.

Advisor:

Lisa Shepherd, Owner of Optimized Integrative Health

Personal Interviews:

Lisa Shepherd, Owner of Optimized Integrative Health

Business Websites:

www.bls.gov

www.indeed.com

Online Articles:

How to Use Social Media to Grow Your Business - Investopedia - Nafeesah Alen

The 9 Goals to Consider When Creating a Marketing Strategy - HubSpot - Hollie Higa