

WELCOME

WORKING WITH CLIENTS THE **OPTAVIA**® WAY

The **OPTAVIA** Success System is a tool to help you organize your business around helping Candidates progress to Clients. By keeping track of all your Candidates and Clients, you'll be able to make sure you give each of them the encouragement and inspiration they need at just the right time. And we believe that's the best way to grow your own coaching business.

WHAT'S IN YOUR **OPTAVIA** SUCCESS SYSTEM?

WELCOME	OPTAVIA HEALTH ASSESSMENT PACK	
This binder divider provides you instructions on how to start using your Success System today!	This pack includes a pad of blank Health Assessments, plus Guidelines which feature a "Sharing" script, Invite examples, a Candidate Follow-up Tracker and Program Considerations.	
SECTION 1	SECTION 2	SECTION 3
CANDIDATE FOLDER Help your potential Candidates become your New Clients.	NEW CLIENTS FOLDER Help your New Clients develop Habits of Health™.	ACTIVE CLIENTS FOLDER Help your active Clients live the best life possible.

SETTING UP YOUR **OPTAVIA** SUCCESS SYSTEM

The system is designed to be flexible and work the way you work best, whether that's with paper or digital files. It won't take you long to get everything ready and then you'll be up and running! Use this convenient binder to track your Clients and Candidates!*

WHEN USING THIS BINDER:

- ① Use the three section folders as dividers.
- ② Keep your Contact List, blank Health Assessments and Health Assessment Guidelines in front of Section 1 (Candidate Follow-Up Folder) for quick reference.
- ③ When Candidates and Clients are on their journey, move their Health Assessment with tracking sheets from one section to the next as you help each person progress.

IF YOU WOULD PREFER TO SET UP A DIGITAL **OPTAVIA** SUCCESS SYSTEM:

- ① **START YOUR DIGITAL SYSTEM:** Create a new Master file folder called: '**OPTAVIA** Success System'. Within your Master folder create three new folders: 'Candidate Follow-Up', 'New Clients' & 'Active Clients'.
- ② **DOWNLOAD:** **OPTAVIA** Success System Instructions; which includes a blank [Contact List](#), [Health Assessment](#) and [Health Assessment Guidelines](#). (Save template files into your Master folder from '**OPTAVIA COACH ANSWERS**').
- ③ **FOR EACH CANDIDATE:** Create a new folder with their name in the 'Candidate Follow-Up' folder. Fill out the digital trackers and save copies within the Candidate's personal folder.
- ④ **AS CANDIDATES BECOME NEW CLIENTS:** Move their Candidate folders into your 'New Client' or 'Active Client' folders.

Reminder: Back up all your files regularly! Plus, visit [OPTAVIA COACH ANSWERS](#) daily to download the newest materials.

* Please note, under the terms of the [Independent OPTAVIA Coach Agreement](#), Coaches have the responsibility of maintaining the security of their Client's and Candidate's information. Coaches should shred or irreversibly delete any of their Client's or Candidate's personal information once it is no longer needed.

GETTING STARTED WITH YOUR **OPTAVIA** SUCCESS SYSTEM

Once you have your files set up it's time to connect with Candidates and help them start their journey to lifelong transformation. It's an exciting time as you start to see the possibilities.

Review your "[OPTAVIA New Coach Steps to Success](#)" guide, located in your Business Kit. Or visit [OPTAVIA COACH ANSWERS](#); [Document Library](#) to download.

NEW COACH STEPS TO SUCCESS

Step One: Get Connected

Clarify your personal motivation for becoming an independent **OPTAVIA** Coach.

Step Two: Learn

Determine what skills to hone by diving into [OPTAVIA's Learning Center](#).

Step Three: Get into Action

Decide who you're going to talk to, and what you're going to say and reach out.

- ① Work on your [Contact List](#), discuss with your Business Coach and identify your **TOP 10 CANDIDATES**.
- ② Decide what you're going to say and reach out to your **TOP 10 CANDIDATES** to share your **OPTAVIA** transformation story and what it could mean for them.
- ③ **SEE HOW THEY RESPOND:**
 - If they're a 'YES' welcome them as a new Client!
 - If they're a 'MAYBE' they stay a Candidate for follow-up and stay on your follow-up list.
 - If they're a 'NOT NOW', thank them and see if they can refer anyone who may be interested.

Step Four: Welcome your First Clients

Start your Clients on their own **OPTAVIA** transformational journey.

U.S. COACHES YOUR CLIENT ACQUISITION BONUS (CAB) IS WITHIN YOUR REACH!

Remember, your US \$100 CAB is waiting for you, and it's only available in your first **30** days as an independent **OPTAVIA** Coach. Try to earn your CAB within your first two weeks as an **OPTAVIA** Coach.

APAC COACHES YOUR QUICK START BONUS (QSB) IS WITHIN YOUR REACH!

Remember, your HK\$2,000/\$\$350 Quick Start Bonus (QSB) is waiting for you, and it's only available in your first **60** days as an independent **OPTAVIA** Coach. Try to earn your QSB within your first 4 weeks as an **OPTAVIA** Coach.

REMEMBER YOUR BUSINESS COACH IS HERE TO HELP YOU!

MAKING PROGRESS WITH YOUR **OPTAVIA** SUCCESS SYSTEM

Once you've started to make contact with your Candidates and you've got your first New Clients, you're up and running! Part of being successful and growing a bigger business is staying in contact with people and helping them progress.

FOR YOUR CANDIDATE FOLLOW-UPS:

- ① Make sure to welcome them using [SHARING SCRIPT](#).
- ② Put their Health Assessment in **SECTION 1 - 'CANDIDATE FOLLOW-UP'** folder.
- ③ **STAY CONNECTED AND SPEAK** to your Candidates periodically to check their interest.
- ④ Once they're ready to get started put their files into **SECTION 2 - 'NEW CLIENTS'** folder.

FOR YOUR NEW CLIENTS:

- ① Work with all your New Clients as soon as possible to fill out a Health Assessment and put it in **SECTION 2 - 'NEW CLIENTS'** folder.
- ② Make sure you have regular check-ins with your 'New Clients', discuss their [Health Assessment](#) with them and make a note of their progress on the tracking sheets.
- ③ Once a Client has been on their Program for one month, move them to **SECTION 3 - 'ACTIVE CLIENTS'** folder.



*lifelong transformation,
one healthy habit at a time.™*

CANDIDATE FOLLOW-UPS

Help your Candidates become your Clients

Remember every one of your Clients started as a Candidate; some people just need a little longer to make their mind up than others. That's why your Candidate follow-up file is so important. Use it to keep track of everyone you've spoken to and make sure you stay in touch with all of them.

Check-in from time to time and see how they're feeling and remind them of your transformation story and experience. Listen carefully to their questions and help them progress.

Every Candidate is one more opportunity for you to be the inspiration that gets someone started on their own path to lifelong transformation.

What to keep in this section:

- Your follow-up list
- All forms for Candidates who need additional follow-up

Top tips for success:

1

Put their Health Assessment and/or Wellbeing Evaluation into 'Section 1 - Candidate Follow-Up'.

2

Stay connected and speak to your Candidates periodically to check their interest.

3

Once they're ready to get started put their files into 'Section 2 - New Clients'.



*celebrate the little victories,
that add up to the big ones*

NEW CLIENTS

Help your new Clients develop healthy habits

Study after study shows that support & guidance increase your chances for success in reaching your optimal weight.* That's why you & the thousands of other independent **OPTAVIA** Coaches are so important.

As your new Clients begin to discover our Fuelings & our Habits of Health™ Transformational System for the first time, make sure you're with them at each step. They'll have questions & you're the best person to help them along the way and steer them to success because you've likely been in their same shoes.

And remember to celebrate all the little victories with each new Client that will, over time, add up to the big ones. Inspire them to stay on their journey to Lifelong Transformation, One Healthy Habit at a Time.™

What to keep in this section:

- All forms for Clients who are in the first month of their **OPTAVIA** journey

Top tips for success:

1

Continue to fill out a Health Assessment & attach it to their Wellbeing Evaluation (if completed). Put the form in this section & organize by your next scheduled contact with them.

2

Make sure you keep in regular contact, take a look at ['How to Get a New Client Started'](#) & ['How to Support Your New Client in their First Week'](#) located on **OPTAVIA COACH ANSWERS (COACHANSWERS.OPTAVIA.com) for more detailed information.**

- Help them select a program & guide them in placing their first order as a member of **OPTAVIA Premier**.
- Send them a 'Welcome Email' & ask them to take a good "before" photo.
- Ask them to subscribe to & join **OPTAVIA** social media channels, your weekly newsletter or online support group (if using).
- Speak to them the night before they start to give them inspiration & outline the information on the Journey Kick-off card that they received in their first order.
- Speak to them on Days 1 through 4 of their program & on Day 7.
- Speak to them twice in Week 2, 3 & 4 then move to a weekly check-in.
- Remind them of great support available via our **OPTAVIA Community**.

3

During your Client check-ins, refer to their Health Assessment and/or Wellbeing Evaluation & keep a note of progress. Take a look at ['Conducting Check-Ins'](#) for more detailed information.

4

Once your Client has been on their **OPTAVIA journey for one month, move them to 'Section 3 - Active Clients'.**

* Appel, L.J., et al., *Comparative effectiveness of weight-loss interventions in clinical practice*. N Engl J Med, 2011. **365**(21): p. 1959-68; Harrigan, M., et al., *Randomized Trial Comparing Telephone Versus In-Person Weight Loss Counseling on Body Composition and Circulating Biomarkers in Women Treated for Breast Cancer: The Lifestyle, Exercise, and Nutrition (LEAN) Study*. J Clin Oncol, 2016. **34**(7): p. 669-76; van Wier M.F., et al., *Phone and e-mail counselling are effective for weight management in an overweight working population: a randomized controlled trial*. BMC Public Health, 2009. **9**: 6; and Donnelly, J.E., et al., *Comparison of a phone vs clinic approach to achieve 10% weight loss*. Int J Obes (Lond), 2007. **31**(8): p. 1270-6.



OPTAVIA®

*the life you want is waiting,
all you have to do is take the first step*

ACTIVE CLIENTS

Help your active Clients live their best life possible

As you help your active Clients achieve and maintain their optimal weight they'll see the benefit as they may increase their health, confidence and vitality. They'll also see how a healthy weight is the catalyst for bigger changes.

And you'll see the benefit as they become enthusiastic advocates for your business. Always make sure you thank everyone who recommends you as an independent **OPTAVIA** Coach to someone else or suggest they pay it forward and coach their family and friends themselves!

What to keep in this section:

- Forms for Clients who have been on their **OPTAVIA** journey for more than one (1) month and are an active Client

Top tips for success:

1

Keep your Client's motivation levels up by recording their progress on the '[Health Assessment: Client Check-in Tracker](#)' during your weekly Client check-ins so you can share and help them see their little - and big - victories.

2

Make it even easier for your Client to enjoy their healthy decisions by showing them how to personalize their own **OPTAVIA** Premier order.

3

As your Client becomes inspired by their own success, ask them if there's anyone else they'd like you to talk to about their transformation with **OPTAVIA** or if they are interested in paying it forward themselves. Always follow-up on these referrals, they're a great way to potentially grow your business.



HEALTH ASSESSMENT GUIDELINES

SHARING SCRIPT

Please use this as a guide as you share the Program with your Candidates

Our Program is comprised of four components that all work together throughout your entire journey:

1 YOUR OPTAVIA COACH:

*The one-on-one personal support and mentorship is what makes our Program stand out. As your personal **OPTAVIA** Coach, I'm there to guide you through the Program and assist you with changing your lifestyle. As your biggest cheerleader, I'll be there for you to share every challenge and victory along the way. I will support you in reaching your optimal weight. I'll provide tips along the way and we'll celebrate the successes throughout your journey!*

2 THE HABITS OF HEALTH® TRANSFORMATIONAL SYSTEM:

It's not just about getting your body healthy, it's also about getting your mind healthy. Our Habits of Health Transformational System is the educational component designed to help you strategize your plan for reaching optimal health and wellbeing.

3 THE OPTAVIA COMMUNITY:

*In addition to your independent **OPTAVIA** Coach, our Community of like-minded people are all on the same health journey and focused on creating better health. From live and recorded Client support calls and webinars, our Community is a place where you can find support, share triumphs and ask questions.*

4 OPTAVIA FUELINGS:

Our nutrition plan is easy to follow—you don't have to count calories or macronutrients, it's all done for you. With our Optimal Weight 5 & 1 Plan®, your body enters a gentle but efficient fat-burning state.

*During this weight-loss phase, you'll have six small meals a day. Five of these meals are Fuelings, which are nutritionally-interchangeable and provide vitamins and minerals along with probiotics which help support digestive health, as part of a balanced diet and healthy lifestyle. The sixth meal is a Lean & Green meal you will prepare yourself, which contains a healthy amount of lean protein and three servings of non-starchy vegetables. Along with drinking 64 oz. of water per day.**

We coach Clients through all three phases of the Program: reaching a healthy weight, transition and optimization.



YOUR
OPTAVIA COACH



THE HABITS OF HEALTH
TRANSFORMATIONAL
SYSTEM



THE **OPTAVIA**
COMMUNITY



OPTAVIA FUELINGS

*We recommend drinking 64 ounces of water each day. Talk with your healthcare provider prior to changing the amount of water you drink as it can affect certain health conditions and medications.

INVITE

I'll partner with you to place your first order to ensure you receive free shipping, 10% rewards and your five (5) free boxes of Fuelings*. One of our kits will give you just what you need.

You'll also be a part of [OPTAVIA Premier](#), this is a recurring monthly order, which will ensure that you don't run out of Fuelings. You'll get a reminder email, which allows you to customize your order from one month to the next. I'll assist you with this when the time comes.

REMEMBER -

IF A CLIENT ANSWERED AFFIRMATIVELY TO ANY OF THE HEALTH QUESTIONS IN "STEP 01: AWAKEN" OF THE **OPTAVIA** HEALTH ASSESSMENT, BE SURE TO CONSULT OUR "[OPTAVIA PROGRAM CONSIDERATIONS.](#)"

From listening to what you shared with me I feel that this could be a perfect fit for you and your lifestyle. If you are ready to go, I am ready to coach you! What would you like to do?

IF YES, THEY ARE READY TO MOVE FORWARD ON THEIR HEALTH JOURNEY:

Great! Let's get you started!

Let me guide you in placing your first order, I'll just need to verify your contact information.

Your Program will arrive in about 1 week. You'll be receiving a welcome email soon.

Your transformation towards achieving your health goals could happen quickly and when it does, people will be asking you about it. When that happens, you can refer those people to me and receive "X" (if you choose to do a referral program on your own to thank people for referrals, please discuss with your Business Coach).

*Or, because people often prefer to be coached by their friends and family, you may want to consider coaching them yourself with training and support provided by me. You may not be thinking about this right now, but who knows... you may feel so incredible with the results you get that you may want to share **OPTAVIA** with others. A significant percentage of our Coaches were first Clients who got healthy and then decided to "pay it forward."*

Please call or text as soon as you receive your comprehensive Program.

IF NOT YET:

I appreciate that you may need to think about this a little bit. How about I give you a call in a few days to see if you have any more questions?

Possibly set up a follow-up appointment? If Candidate agrees, write follow-up on Health Assessment.

Also ask, "as you meet others who are also looking to get healthy, please feel free to refer them to me."

FOLLOW-UP STRUCTURE:

- Send a thank you text or email, assuring them that you would love to partner with them to **[insert their why]**. Consider sharing a story they can relate to.
- If you put your Candidates in your Facebook Client support page, ask them for permission to add them to this page.
- Put them in your **Section 1 - 'Candidate Follow-up'** folder and follow-up on your follow-up day.

OPTAVIA PROGRAM CONSIDERATIONS

It's important for you to understand that there are multiple aspects of one's health to consider when selecting which **OPTAVIA** Program fits best for a Client. Some of these can be allergies, medication interactions or general health conditions.

Please see below to help guide you in coaching your new Client towards their optimal health and wellbeing journey.



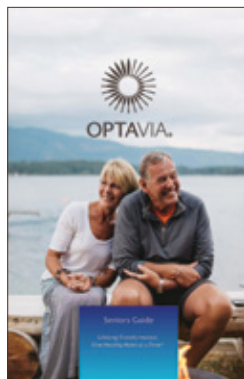
Diabetes Plan:

While [the Optimal Weight 5 & 1 Plan](#), [the Optimal Weight 4 & 2 & 1 Plan](#)® and [the Optimal Weight 5 & 2 & 2 Plan](#)® are all appropriate for people with diabetes, it's essential that the individual's healthcare provider monitors blood sugar and medication dosages. Continued medical monitoring by the healthcare provider will be necessary.



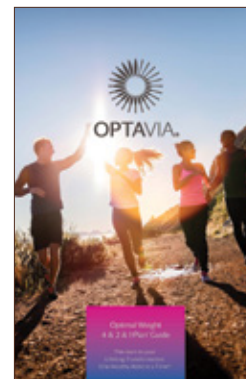
Gout:

Our **OPTAVIA** for Gout Plan promotes gradual weight-loss and encourages food choices with only low or moderate amounts of purines. [The Optimal Weight 5 & 1 Plan](#), [the Optimal Weight 4 & 2 & 1 Plan](#) and [the Optimal Weight 5 & 2 & 2 Plan](#) are not appropriate for someone who has a history of gout, even if it's been quite some time since their last gout flare.



Seniors Guide:

People age 65 and older can use [the Optimal Weight 5 & 1 Plan](#) with 30 minutes of physical activity every day. A higher calorie meal plan may be recommended based on individual needs, especially those who are sedentary.



Optimal Weight 4 & 2 & 1 Plan:

[The Optimal Weight 4 & 2 & 1 Plan](#) is an easy meal plan to help individuals reach a healthy weight. It may be right for those who exercise greater than 45 minutes per day, have less than 15 pounds to lose, are 65 years or older and not regularly active or want to incorporate fruit, dairy and starches.



Plan Overview:

See all Plan overviews in one location.



Nursing Mothers Plan:

Our **OPTAVIA** for [Nursing Mothers Plan](#) is designed for the nursing mother whose baby is over two months of age and who is providing the majority of the baby's nutrition through breast milk.



Teen Plans:

Our **OPTAVIA** for Teens Plans are specifically designed to meet the nutritional needs of adolescent **boys** and **girls**, 13 - 17 years old. Do not use the **OPTAVIA** Program if you are under the age of 13 years old.

MEDICATION DISCLAIMER:

Before starting a weight-loss program, Clients should talk with their healthcare provider about the program and any medications or dietary supplements they are using, especially:

- *Lithium
- *Diuretics
- *Medications for Diabetes
- *Medications for High Blood Pressure
- *Medications for Thyroid Conditions
- *Coumadin (Warfarin)

Visit COACHANSWERS.OPTAVIA.com to find out more.

MEDICAL DISCLAIMER:

The Company ("We") recommends that you consult your healthcare provider prior to starting any weight-loss program, and during the course of your weight-loss program. Do NOT use any **OPTAVIA**® plan if you are pregnant or under the age of 13.

Before starting a weight-loss program, talk with your healthcare provider about the program and about any medications or dietary supplements you are using, including especially Coumadin (Warfarin), lithium, diuretics, or medications for diabetes, high blood pressure or thyroid conditions. Do not participate in any **OPTAVIA** Program until you are cleared by your healthcare provider if you have or have had a serious illness (e.g. cardiovascular disease including heart attack, diabetes, cancer, thyroid disease, liver or kidney disease, eating disorders such as anorexia or bulimia), or any other condition requiring medical care or that may be affected by weight-loss.

The **OPTAVIA** for Teens plan is the only **OPTAVIA** Program appropriate for teens (13 to 17 years of age). The Optimal Weight 5 & 1 Plan® is NOT appropriate for teens, sedentary older adults (65 years and older), nursing mothers, people with gout, some people with diabetes and those who exercise more than 45 minutes per day – if you fall into one of these categories, please consult your healthcare provider and refer to www.OPTAVIA.com and talk with your independent **OPTAVIA** Coach about other **OPTAVIA** plans that may be appropriate. For special medical or dietary needs, including food allergies, refer to our program information online, consult your healthcare provider and talk to your **OPTAVIA** Coach. Do not consume an **OPTAVIA** product if you are allergic to any of that product's ingredients which are listed on the product packaging and on the **OPTAVIA** website.

We recommend drinking 64 ounces of water each day. Consult with your healthcare provider prior to changing the amount of water you drink as it can affect certain health conditions and medications.

NOTE: Rapid weight-loss may cause gallstones or gallbladder disease or temporary hair thinning in some people. While adjusting to the intake of a lower calorie level and dietary changes, some people may experience dizziness, lightheadedness, headache, fatigue or gastrointestinal disturbances (such as abdominal pain, bloating, gas, constipation, diarrhea or nausea). Consult your healthcare provider for further guidance on these or any other health concerns. Seek immediate medical attention if you experience muscle cramps, tingling, numbness, confusion or rapid/irregular heartbeat as these may be a sign of a more serious health condition.

For avoidance of doubt, the **OPTAVIA** Programs and products are not labelled, advertised or promoted for any specific medicinal purpose, i.e. treatment or prevention, implied or otherwise, of any disease or disorder, including its related conditions.

The **OPTAVIA** programs, products and any of its materials and/or information do not in any way constitute medical advice or substitute for medical treatment. As individuals may have different responses to dietary products or changes in diet, consult with your healthcare provider regarding any medical concerns.

For further information regarding this Medical Disclaimer, call Nutrition Support at 1.888.OPTAVIA or email at NutritionSupport@OPTAVIA.com

NAME: _____ EMAIL: _____

CLIENT ID NUMBER:	PREFERRED METHOD OF CONTACT:	PHONE:
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"It's great speaking with you today and I'm excited to see if I can assist you with your goals. Before we can determine if one of our Programs is right for you, I'd like to ask you a few questions to learn about you and your health goals. Does that sound good?"

STEP 01: AWAKEN

1 *I would love to hear what you would like to accomplish with your health. (Weight-loss, improved sleep, better response to stress, etc.)*

2 *What is your main motivation for wanting to make changes to your health? (Relationships, activities, how you will feel, etc.)*

3 *Can you tell me about a time in your life when you were healthier? What has changed between then and now?*

4 *Tell me about your health: Do you have any allergies or medical conditions that could influence which Program we choose?**

*Reminder: We recommend that Clients contact their healthcare provider before starting and throughout their weight loss journey.

5 *Are you Pregnant?* YES NO *Are you nursing?* YES NO *If yes, how old is your baby?* _____

<p>6 <i>Are you taking any medications for:</i></p> <p><input type="radio"/> Diabetes</p> <p><input type="radio"/> High Blood Pressure</p> <p><input type="radio"/> Lithium*</p> <p><input type="radio"/> Thyroid[†]</p> <p><input type="radio"/> Coumadin (Warfarin)[‡]</p> <p><input type="radio"/> Other medications:</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>7 <i>Do you have the following:</i></p> <p><input type="radio"/> High Blood Pressure</p> <p><input type="radio"/> Diabetes Type I</p> <p><input type="radio"/> Diabetes Type II</p> <p><input type="radio"/> Gout</p> <p><input type="radio"/> Gluten Intolerance or Sensitivity</p> <p><input type="radio"/> Soy Allergy or Intolerance</p> <p><input type="radio"/> Food Allergies</p> <p><input type="radio"/> Other</p>
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8 *Now that you've shared some of your current health goals, I want to give you a quick idea of what is possible.*

Share YOUR story (or someone else's). Take 90 seconds or less to share the pieces of your story or a Client's story that will connect with this person.

*Lithium: The healthcare provider may wish to adjust frequency of lab work for the Client and monitor.
[†]Thyroid Medications: The healthcare provider may wish to monitor thyroid hormone levels while the Client is on the Program and adjust medication.
[‡]Coumadin (Warfarin): The healthcare provider may wish to review food choices, conduct lab work and/or adjust medication.

Remember: If a Client answers affirmatively to any of the questions to the left, consult the **'Health Assessment Guidelines: OPTAVIA Program Considerations'** page before suggesting a Program.

STEP 02: DAILY ROUTINE & HABITS

SLEEP & ENERGY

How many hours of sleep do you get in a typical night? _____

How would you describe the quality of your sleep? _____

On a scale of 1-10, what is your energy level throughout the day? _____

MOTION

How would you describe the quantity & quality of the activity you do each week? _____

How many hours a day do you sit? _____

How many days a week do you exercise? (0 - 7 days) _____

What types of physical activity do you enjoy? _____

MIND

On a scale of 1-10, how fulfilled are you? _____

On a scale of 1-10, how much do you worry? _____

What area of your life tends to be the biggest stress for you? _____

What do you do for work? _____

On a scale of 1-10, how much do you enjoy what you do? _____

FOOD & HYDRATION

How many meals and snacks do you eat per day? _____

When do you eat your first meal of the day? _____

How many times a week do you eat out? And where? _____

How many ounces of water do you drink per day? _____

Do you drink other beverages? Coffee, soda, alcohol, tea, etc.

If so, how often and how much? _____

WEIGHT MANAGEMENT

Are you comfortable sharing your age? _____

How tall are you? _____

How much do you currently weigh? _____

What would you consider to be a healthy weight for you? _____

Have you tried to lose weight in the past? _____

What has been difficult for you about losing and maintaining weight? _____

SURROUNDINGS

On a scale of 1-10, how healthy would you rate your surroundings?

(Does this person have healthy and active friends, supportive family, keep junk food in the house, etc.) _____

Is there anyone in your life who would like to get healthy with you?

Is there anything else you think I should know about your health?

Thank you for sharing, now I'd like to tell you how our Program could help you achieve your goals.



NEXT STEP: Refer to the '[Health Assessment Guidelines: Sharing Script](#)'

CLIENT TRACKING INFORMATION:

HOW DID WE MEET?	
LEAD	REFERRAL OF:

STARTING WEIGHT:

GENDER:		AGE:	
CURRENT WEIGHT:		CURRENT BMI:	
DESIRED WEIGHT:		DESIRED BMI:	
HEALTHY WEIGHT RANGE:			
HEALTH ASSESSMENT DATE:			
ORDER DATE:		START DATE:	

ADDRESS:	
CITY/STATE/ZIP:	
TIME ZONE:	

COACH CHECKLIST:

- RECOMMEND CLIENT CONSULT THEIR HEALTHCARE PROVIDER BEFORE STARTING A PROGRAM
- CONFIRM RECEIPT OF CLIENT'S WELCOME EMAIL (BEFORE & AFTER, MEASUREMENTS AND GUIDE)
- SEND FRIEND REQUEST VIA FACEBOOK, ADD TO FACEBOOK SUPPORT GROUP AND WELCOME THEM
- SEND JOURNEY KICK-OFF VIDEO AND CONFIRM VIDEO WAS VIEWED BEFORE YOU HAVE A BRIEF NIGHT BEFORE CONVERSATION
- ADD CLIENT TO YOUR NEWSLETTER
- SET UP DAILY SUPPORT MESSAGES (VIRTUAL OR TEXT)
- INVITE TO SUPPORT CALLS
- TEACH CLIENT ON HOW TO REFER OTHERS
- SEND OPTAVIA PREMIER ORDER VIDEO WHEN 7 DAY REMINDER EMAIL COMES

COACH TIPS:

As your Client begins their journey to optimal wellbeing, they may feel hungry, tired or irritable as their body adjusts to a new way of eating. While adjusting to intake of a lower-calorie level and diet changes, some people may experience temporary lightheadedness, dizziness or gastrointestinal disturbances.

When speaking to your Clients, here are a few additional tips to make the adjustment period easier into fat burning for your Clients.

You can remind them to:

- Download and use the Habits of Health® App to track their Fuelings and water intake.
- Stay hydrated with water.*
- Consider choosing a start date when you don't expect any social food-centered events.
- Stay busy.
- Approach their health journey, one day at a time.
- Open up *Your LifeBook*, put your name in it & read the introduction, once in a fat burning state.
- Avoid temptations, and stay focused on your health goals.
- Sip on 1 cup of broth or eat 2 dill pickle spears (as needed in the first few days). **If Client has no sodium restrictions.**
- Wait to start exercising for 2 - 3 weeks on the Optimal Weight 5 & 1 Plan®. **We recommend checking with your doctor before starting any exercise program.**

*We recommend drinking 64 ounces of water each day. Talk with your healthcare provider prior to changing the amount of water you drink as it can affect certain health conditions and medications.



HEALTH ASSESSMENT: CLIENT CHECK-IN TRACKER

Make sure to call your Client during the first week per the schedule below!

Please use the following pages to continue your check-ins. Confirm a weekly check-in day. ○ ○ ○ ○ ○ ○ ○

Ask them: *"Have you shared your success with anyone? Are people asking you about your transformation?"*
 When that happens, you can refer those people to me and receive "X" (if you choose to do a referral program on your own to thank people for referrals, please discuss with your Business Coach). Or, because people often prefer to be coached by their friends and family, you may want to consider coaching them yourself. A significant percentage of our Coaches were Clients first who became healthy and then decided to "pay it forward."

	DATE	NOTES:
JOURNEY KICK-OFF CHECK-IN		
DAY ONE CHECK-IN		
DAY TWO CHECK-IN		
DAY THREE CHECK-IN		
DAY FOUR CHECK-IN		
DAY SEVEN CHECK-IN		

TIPS FOR WORKING WITH NEW CLIENTS:

- 1 Place their completed Health Assessment in **Section 2 - 'New Clients'** folder.
- 2 Make sure you have your weekly check-ins with your New Clients, discuss their Health Assessment with them and make a note of their progress.
- 3 Set a Client Support day during the week and graduate all Week 1 - Clients to that day's schedule moving forward.
- 4 Once a Client has been on their Program for one month, move them to **Section 3 - 'Active Clients'** folder.

WEEK 2 CHECK-IN		
CHECK-IN		
WEEK 3 CHECK-IN		
CHECK-IN		
WEEK 4 CHECK-IN		
CHECK-IN		

	DATE	NOTES:
WEEK 5 CHECK-IN		
CHECK-IN		
WEEK 6 CHECK-IN		
CHECK-IN		
WEEK 7 CHECK-IN		
CHECK-IN		
WEEK 8 CHECK-IN		
CHECK-IN		
WEEK 9 CHECK-IN		
CHECK-IN		
WEEK 10 CHECK-IN		
CHECK-IN		
WEEK 11 CHECK-IN		
CHECK-IN		
WEEK 12 CHECK-IN		
CHECK-IN		

CONTINUE CHECK-INS WITH YOUR ACTIVE CLIENTS TO ASSIST THEM ON THEIR JOURNEY THROUGH OUR HABITS OF HEALTH TRANSFORMATIONAL SYSTEM.

Blank 'Client Check-In Trackers' are available for download on COACHANSWERS.OPTAVIA.COM