

3-WAY CONVERSATION TIPS

GENERAL GUIDELINES

- 3-way conversations can happen over the phone, via web conferencing (such as Zoom), or face-to-face. Work with your Business Coach to determine the best method.
- These conversations should take about 20-30 minutes with the Candidate doing most of the talking.
- Take notes using the [Health Assessment with script and guidelines](#), or the [Wellbeing Evaluation](#).

BEFORE THE CONVERSATION

- On the day you are scheduled to talk, confirm the time with your Candidate and Business Coach. This can be done via group text, email to both, or private group message on Facebook. This way, after the conversation, the three of you will be connected and your Business Coach can help answer any questions and provide additional support.
- Just before the conversation, provide some background information to your Business Coach about your Candidate: how you know them, what they might be interested in/looking for, and anything else you think might make the conversation more meaningful.

DURING THE CONVERSATION

- At the start of the conversation, welcome and introduce both parties.
- Introduce your Business Coach to your Candidate, edify who they are and explain how they have helped you and others. By doing so, you increase his/her value in your Candidate's eyes.
 - » Example: Jim's been a great resource and support for me on my journey to optimal health. He's helped dozens of people get healthy and is very knowledgeable.
- Introduce your Candidate to your Business Coach, edify who they are and their relationship to you.
 - » Example: Susie is a bank manager and also my oldest childhood friend.
- Highlight the reason you set up the call; reiterate the reason for bringing everyone together.
 - » Example: Susie mentioned that she was looking to get healthier, sleep better, and reduce some of the stress in her life.
- Your Business Coach will open up the dialogue with your Candidate.
 - » Example: So, Susie, tell me a little bit more about yourself..
- Let him/her guide most of the conversation. He/she may ask you to share your story and contribute.
- Listen to the flow and content of the discussion. Observe how your Business Coach asks questions and provides information.
 - » Take notes on what you hear for your debrief afterward.
- Have a Health Assessment in front of you to take notes about your Candidate. You will learn many new things about your Candidate as you observe the conversation. Listening and writing down what you hear will help you get to know them better and build a stronger relationship, helping them live their best life!

AFTER THE CONVERSATION

- Debrief with your Business Coach after the conversation.
 - » Go over the call to review what transpired.
 - » Review your notes and ask your Business Coach questions.
 - » Decide on next steps with the Candidate.
- Remember, the goal isn't necessarily to start the Candidate (unless they are ready). It is to watch your Business Coach in action so that you can learn how to invite Candidates to learn more about **OPTAVIA**®.

We encourage you to work with your Business Coach/Mentor support team throughout this process. Our Community is here to support you every step of the way. Questions? Check out [OPTAVIA Answers](#), call 1.888.OPTAVIA, or fill out the Contact Us form on your **OPTAVIA** personalized website!