

## CONDUCTING CHECK-INS

Now that your Client has gotten through their first week on the Program, it's important to establish regular check-ins. **These points of contact should happen via telephone and occur twice each week during weeks 2, 3, and 4 and once weekly thereafter.** Check-ins continue to build the relationship and provide a forum to discuss progress, answer questions, and provide more information about **OPTAVIA**<sup>®</sup> and the opportunity to pay it forward as an **OPTAVIA** Coach.

### GENERAL TIPS

Touching base each week via the phone or web conferencing is always the best method; if you leave a message, provide your coach contact information and ask them to call you with an update and/or questions.

- Ask them what went well from your last conversation and celebrate their little victories that add up to big ones during the conversation (i.e. Their Wins of the Week (WOW)!) Try to not focus on pounds lost, but the victories such as:
  - » Increased energy to enjoy activities with family or Community
  - » Improved sleep
  - » Reduced stress
  - » Being mindful of choices
  - » Focusing on goals
- Ask them what they learned about themselves this week.
  - » You may have to prompt them with a personal example, such as “I learned that I don’t have to have the donuts during the weekly staff meeting” or “I really enjoy my nightly walk.”
  - » Look for ways to engage them more in healthy habits.
- Check their progress and advise accordingly (if they are struggling or have reached a plateau, review the [OPTAVIA Guide](#) or reach out to [Nutrition Support](#)).
- Ask them about any potential challenges that you can help them prepare for (i.e. anything where they may be tempted to deviate from their plan: parties, vacations, weddings, reunions, holidays, etc.).
- Continue to be empathetic and actively listen to what they are saying. Be present in the moment with them, and remind them that you are there for them.
- Continue to reassure your Client that no matter what they may be feeling or experiencing, that the habits they are learning are getting their mind and body together to work for them, and that every healthy decision, every positive change leads to more. Encourage your Client to continue to use the support available (you and the **OPTAVIA** Community) to create optimal health and wellbeing.

Don't forget - your conversations with your Clients plant the seeds for referrals and coaching. Help your Clients form their understanding about what it means to pay it forward as an **OPTAVIA** Coach, since their transformation will be an inspiration to others. The opportunity will arise for you to explore coaching with them, so make sure your conversations reflect how fun, easy, and rewarding it is to be an **OPTAVIA** Coach! Share your story with them!

## DAY 1

- Congratulate them on Day 1.
  - » Ask for their starting weight (“Do you mind sharing how much weight you would like to lose? And, if you don’t mind, could you share how much you currently weigh?”) OR
  - » Note: some Clients may not be comfortable sharing their weight. If so, just let them know that it’s fine. The focus will be on their progress and being mindful of their goals.
  - » Alternatively: Use the [BMI chart](#) to find their current BMI and establish their goal.
  - » Remind them to take their measurements: waist circumference and others if desired.
- If they haven’t taken their “before” photo, remind them to so they can track progress visually.
- Ask them to take you through Day 1: Fuelings, times, and Lean & Green meal. Advise accordingly.
- Ask how they are feeling. If they have concerns, refer to the [OPTAVIA Guide](#).
- Ask if they have any questions.
- Confirm time to call them on Day 2.

## DAY 2

- Congratulate them on Day 2.
- Ask them to take you through Day 2: Fuelings, times, and Lean & Green meal. Advise accordingly.
- Ask how they are feeling.
- Ask if they have any questions.
- Confirm time to call them on Day 3.

## DAY 3

- Congratulate them on Day 3.
- If following the Optimal Weight 5 & 1 Plan® exactly, tell them they should be in fat burn soon, if not already.
- Ask them to take you through Day 3: Fuelings, times, and Lean & Green meal. Advise accordingly.
- Ask how they are feeling.
- Ask if they have any questions.
- Confirm time to call them on Day 4.

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 personalized [OPTAVIA](#) website!

## DAY 4

- Congratulate them on Day 4.
- Review signs of fat burning: more energy, decreased hunger, improved sleep, and feeling better overall.
- Ask them to take you through Day 4: Fuelings, times, and Lean & Green meal. Advise accordingly.
- Ask how they are feeling.
- Ask if they have any questions.
- If everything is going well (in fat burn on the Optimal Weight 5 & 1 Plan®), then set up your next check-in.
- If they are struggling, review their program again and provide additional tips for success.
- Encourage them to contact you if they have any questions before your next check-in.
- If they haven't already read it, email them the PDF of Dr. A's eBook, [Stop. Challenge. Choose.](#) and let them know this may be helpful and motivating, and ask them to read it.

## WHAT'S NEXT?

- Day 7 - Celebrate your Client on their first week! Remind them that when they know what healthy nutrition looks like, healthy eating becomes second nature™.
- Week 2 - Check-in via telephone 2 (two) times this week, continue to celebrate the little victories that add up to the big ones, answer questions, and provide encouragement and guidance.
- Week 3 - Check-in via telephone 2 (two) times this week, continue to celebrate them and their best life, answer questions, ask about referrals and/or plant the seeds for coaching and provide encouragement and guidance.
- Week 4 - Check-in via telephone 2 (two) times this week, continue to celebrate them, answer questions, ask about referrals and/or plant the seeds for coaching and provide encouragement and guidance.
- Week 5 - and onward - Check-in via telephone 1 (one) time this week in the same way you have been!