



NEW COACH CHECKLIST

How exciting! Your New Independent **OPTAVIA** Coach is starting on their **OPTAVIA**® journey. This checklist can help you stay organized to get them into action and experiencing success.

Name: _____ CAB Date: _____

Activation Date: _____

1. Get them started:

- Confirm they have started a list of 5 - 6 people that they would like to help start their journey for their first 3-way calls. Help with this process right away.
- Set up a Meet & Greet with your new Coach & your Business Coach/Mentorship Team to show Community & support.

2. Encourage them to set up three-way calls with the first few Candidates on their list right away so that they can begin to feel comfortable sharing our offer effectively.

- Prior to the first call, review the [3-way call Conversation Tip](#) document, their story (to ensure they can share it effectively), and ask that they have a [Health Assessment](#) ready to take notes.

_____	Client	Coach	Follow-Up Needed?	_____
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- » Note: Repeat this process with the new Coach listening to first 3 calls. As you are building your team, you'll repeat this process with the new Business Coach listening to the last few calls.
- » Note: It's always a great idea to debrief after each call to confirm learning and next steps, using the **OPTAVIA** Success System.

_____	Coach	Follow-Up Needed?
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 - If they become a Client - teach [Welcome Email](#) (mark above)
 - If they aren't ready yet - teach [follow-up system](#) (mark above)

3. Connect them with our Community & Resources when your new OPTAVIA Coach is ready, after the 3-way calls occur. You are providing "on the job training" giving them information they need just in time, in a way that doesn't overwhelm.

- Review the content shared in our **OPTAVIA** Coach [Welcome Email](#) with your new Coach and the appropriate [OPTAVIA Learning Center](#) resources and videos.
- CAB achievement
- [Senior Coach Celebration](#) - revisit WHY and next milestones

Notes:
