

## HOW TO GET A NEW CLIENT STARTED

Your new Client is ready to join the **OPTAVIA** Community! Here are the steps to getting them started right on their journey to lifelong transformation.

Remember: many of our **OPTAVIA** Coaches were Clients first, so how you start them is their first experience of what it means to be a Coach. Keep it fun, simple, rewarding, and show that it can fit into their life. Get ready to celebrate the little victories that add up to the big ones.

### QUICK OVERVIEW

1. Have a conversation with your Candidate, and complete either the [Health Assessment](#) or [Wellbeing Evaluation](#) during that time.
2. Help them select the program that is right for them.
3. Help them place their first order (recommend the **OPTAVIA** Essential Optimal kit with the Habits of Health<sup>®</sup> system).
4. Send them a personal Welcome email.
5. Ask them to take a good “Before” picture if weight loss is one of their goals.
6. Add them to your newsletter (if applicable).
7. Add them to your team’s online support page (if applicable).
8. When their order arrives, ask them to:
  - a. Read the [OPTAVIA Guide](#)
  - b. Call you to let you know when they plan to start
9. Introduce them to your Business Coach when appropriate.
10. Talk to them the day before they start their program for their Journey Kick-Off call, and review the [Journey Kick Off card](#) that they received in their first order.
11. Touch base with them by phone on Days 1 - 4 of their program and twice during their second, third, and fourth weeks, and once per week after that.
12. Establish an ongoing weekly Client Check-in day.
13. Remind them of all of the great support available via our **OPTAVIA** Community.