

CHECKLIST FOR STARTING A NEW CLIENT

KEEP IT SIMPLE

CLIENT NAME _____ DATE STARTED _____

The goal of these steps is to provide you with an efficient and effective method of starting your clients off strong and fully-integrating them into the proven support system.

- Invite them to join your team's Client Support Facebook group page
- Send the following series of texts before they start and during their first week.** Just copy and paste the messages for each day (Save this link to your phone for quick access)
https://lookaside.fbsbx.com/file/Daily%20Texts.pdf?token=AWz-6dVv1dvV2VYR4RnZmXKIYvwr7qAB0ZNxMovi5KNcOMtkIVTt-Ua5QLISYj69Zlg6mBM5BO5gawbCW1DZVqhulfdlb_ZalhunvzE0v01UX10wQy4MGuTKMw33nUL5DzJaD_gZhBjpNKjizl5wXGeCm89SAm2lq-q75pFhgs_ZP6ef4ge0qoYt35NgGsmSiPI8VO58ZnMI10HGgHZj3a1f
- Conduct "Journey Kickoff Call" the night before they begin (it's important that they have watched, prior to the call, the video that you sent in the "Day Before" text message -- see above)
- Call them each day for first 4 days. This link will give you some ideas for your calls
http://optaviamedia.com/pdf/learn/OPTAVIA_LRN-HOWTO-Support-Week1.pdf
- At the end of the first week, set up a "Tip/Celebration Call" with them (the Day 6 text already asks for a time/date)
- Encourage them to attend the client support webinar each week:
 - Wednesday – Habits of Health Webinar @ 8:30pm EST, Zoom #111312513
 - Have them opt-in to weekly text reminders by texting OPTAVIA30 to 99000
- Set up a schedule to conduct a 5-10 minute call with them once a week on an ongoing basis (this will help you to not be overwhelmed with supporting clients and will encourage them to "own" their own journey).
 - *What can I celebrate with you this week?*
 - *What did you learn from the Habits of Health call?*
 - *What Element are you working on in your Life Book? (specific element questions are located in the coaching guide)*
 - *Who's noticing your health changes?*

Ensuring your clients are "fully-integrated" (health coach, habits of health, community, and fuelings) is a predictable formula for success. If any of these are left out, their chances decrease. The above steps will help you help them!