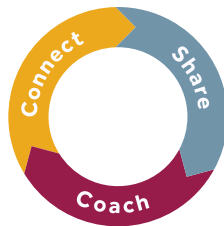




OPTAVIA®
COACHING QUICK START



Your guide to starting strong in the first 30 days

Welcome to the **OPTAVIA** Family!

Congratulations on joining us - we can't wait to work with you. Over the next few weeks, we hope you'll realize three key things:

1. Coaching is FUN.
2. Making time to help people improve their health is SIMPLE.
3. I'm getting REALLY GOOD at this!

We want you to succeed quickly, so we'll be partnering with you while you learn the secrets of becoming a great Coach. Take a look at the Checklist for New Coaches.

During your initial training, you'll set up 4-6 Health Assessments with friends and family who are interested in our program.

Your Training Coach will lead the first few calls. Then they'll listen and support you while you lead a few more until you've got the confidence and competence to go solo.

Let's get started! We'll be here to help you every step of the way.

1. Connect

Reaching out to people who might be interested in improving their health.

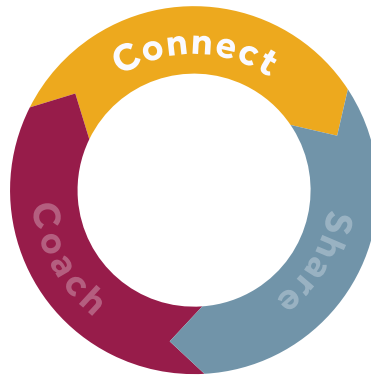
2. Share

Building your confidence and competency through hands-on training with our Health Assessment.

3. Coach

Time to begin leading your first Clients to better health!

1. Connect



Let's begin by reaching out to all the people in your life who might be interested in improving their health.

If you didn't already create a list of the first 8-10 people you'd love to help, take a few minutes to complete it. Remember, this is not just about weight-loss. You'll be offering them the much bigger gift of Lifelong Transformation, One Healthy Habit at a Time®.

After this, you'll be ready to set up a three-way Health Assessment call with your Coach. If you need help with how to start the conversation by phone, social media or in person, we have a few ideas for you below.

You may also want to ask your Coach about using social media to share your story and how to start living your life out loud. Check out our Social Media best practices.

Talking points for Connecting

The best way to share **OPTAVIA** is in a live conversation. But how do you reach out and get the conversation started?

Well, don't worry, we've got you covered with these talking points from our top Coaches. Whether you initiate a conversation by texting, social media, email, phone calls or in person, treat these soundbites as inspiration. Change the words to suit how you're connecting with someone, your relationship with the person and your personal style. Importantly, be curious, confident - but most of all... be you!

Some new Coaches like to start reaching out to people they already know and have talked about health with in the past. (Maybe you've even worked out together, been diet buddies, or chatted with them about health. Maybe they've noticed your success already and asked you about it.)

Try reaching out by text or direct message to see where you share health struggles and desires - and to share your excitement for **OPTAVIA**. You may want to start the conversation via text and then get into details over the phone.

"Hi, <NAME>, call me, I've got something exciting to share with you."

Hey, <NAME>, how are you?
I know we've discussed health goals in the past and shared some similar frustrations. I would love to catch up and see how you are doing in this season of life."

"Hi, <NAME>, thanks so much for commenting on my post today, your encouragement means the world! How are you doing today?"

Hey, <NAME>, how are you? I'm not sure if you've noticed my pictures at all but I've been working on my health goals and I'm excited by my progress. I know you & I have chatted about all the diets we used / trying to find something that worked / that your doctor was going to put you on meds...."

"I've lost <X>lbs already and feel better than I have in 10 years. I'm also sleeping so much better. I knew immediately I needed to reach out and share just how amazing this program is or you'd probably never forgive me :) "

Other new Coaches like to start reaching out to people they know who could benefit from **OPTAVIA**. Maybe you haven't talked about health together before, but you think they could really benefit from our program. Because you haven't had a direct conversation, share more of your story first. Again, try reaching out by text or direct message to share your journey and introduce **OPTAVIA**.

"Time is rushing by, it seems like so long <NAME>! It's been a rollercoaster of a year hasn't it? How are you and the family doing?"

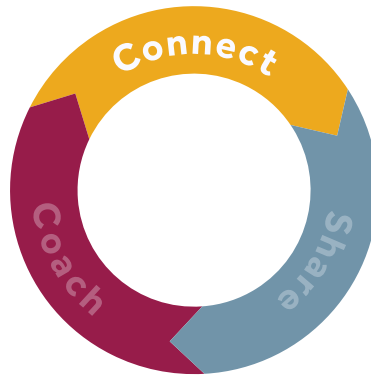
"So fun to see the birthday pictures from last weekend, we had a blast. Let me know when you're free to chat, I've got something exciting to share."

"Like many, this year has brought the importance of good health to the forefront. I'm not sure if you know but a few months ago I made the decision to work on my health like never before. I finally found a program that works, I've lost <X> lbs and have so much more energy. I feel the best I have in years!"

"I've been so impressed with the program that I decided to become a Coach too. I'm reaching out to everyone I know to share, so if you or anyone you know is looking for a great program that assists you to lose weight and feel great, please send them my way. I'd love to share more!"

Remember that you can also be using social media to generate interest from other people as they watch your journey on your social media accounts. Head to our Social Media section to learn more.

2. Share



It's time to build your confidence and competence for sharing **OPTAVIA**. In the previous Connect section, we helped you reach out to people and schedule your first set of Health Assessments. So before you make your first call, print out some copies of the Health Assessment and a copy of Sharing the 4 Components below.

You'll be listening and taking notes while your Training Coach leads the first few calls. Make sure you're picking up everything you need to know by debriefing with your Coach after each of these calls. Then it's time for you to start leading more and more of the call with your Training Coach listening in. You'll be surprised how quickly and easily your coaching skills develop!

As you begin to lead calls on your own, remember that your Training Coach and Support Team are always here to help. We want you to feel confident about your Health Assessments - and excited to be sharing **OPTAVIA**'s benefits with more and more people.

Talking points for Sharing

When you Share, there are 3 key things you should be aware of:

Mindset

Try to keep an open mind. Sharing is about discovery and curiosity.

Inspiration

You're going to awaken people's desire to improve their health by understanding their goals.

Empathy

You'll be exploring your Candidate's everyday life so you can connect that to what matters to them and how the program can help.

The more confidence and enthusiasm you bring, the greater your success will be!

Sharing the 4 components

OPTAVIA is a full program that's different from anything your Client has seen before. Introducing the **4 Components** of the program will help them to understand how changing their habits can lead to optimal health and lifelong transformation.

Here's how you might introduce each of them:

"Our program is designed to offer you lifelong transformation by developing one healthy habit at a time. It isn't about reaching a specific goal, it's about developing the mindset and skills you need to optimize your health. There are 4 components that work together to create a successful plan."

1. Your OPTAVIA Coach

"I'll check in with you every day during your first week. Then we'll move to a weekly 5 minute call, but you can reach me as needed."

2. Habits of Health Transformational System

"One of **OPTAVIA's** co-founders is Dr. Wayne Scott Andersen. He designed the Habits of Health® system to keep your health moving forward. And if you keep track of your health journey in your Lifebook, you'll learn which habits to let go of - and which ones to keep."

3. The OPTAVIA Community

"It's important to surround yourself with others who are also moving their health forward. Our Community and weekly Community calls will help you stay motivated."

"Over time, one of my goals is for you to develop your own local community."

"Trust me, friends and family will notice the changes in you and they'll want to be involved. You can choose to introduce them to me - or partner with me to coach them yourself!"



4. Feelings and programs backed by science

"**OPTAVIA** meals are called Fuelings. They're scientifically formulated with the right balance of carbohydrates, protein and fat, which helps promote a gentle, but efficient fat burning state when on Plan. Other benefits of a fat burning state may include naturally reducing your appetite and hunger while still allowing you to feel sufficient levels of energy all while losing weight."

If your Client is on the 5 & 1 Plan:

"You'll be eating 6 times a day - or every 2 to 3 hours - on your program. And the great news is - you won't need to prepare 5 of your 6 meals! They'll be provided by **OPTAVIA**. The other meal is the 'Lean & Green' meal. You make this meal yourself with 5-7 oz. of cooked lean protein, 3 non-starchy vegetable servings and 0-2 servings of healthy fat, depending on your lean protein choice. You'll also be drinking 64 oz. of water each day.*"

"I'll be with you for every step of your journey. And when you reach your desired goals, I'll help you transition to a plan that keeps you on track going forward."

If your Client is on a different plan or has specific needs, refer to [these guides](https://answers.optavia.com/help/program-guides).
<https://answers.optavia.com/help/program-guides>

***OPTAVIA** recommends drinking 64 ounces of plain water each day. Talk with your healthcare provider prior to changing the amount of water you drink as it can affect certain health conditions and medications.

The Invitation

Once you've explained why the program is so great and how it works, you need to demonstrate the value of **OPTAVIA** in ways that your Client Candidate can relate to.

"Think about how much you spend on food per day. \$15? \$20? \$25? For many people, switching to the program costs about the same - or potentially less - than what they already spend on groceries for themselves. If you think about it, it's really just like swapping grocery stores."

"The approximate cost of the program is ONLY \$3 a meal, and includes your Fuelings, coaching, education and access to our community, all for around \$414 for your first month. And as you continue on the program, it's about \$15 a day. When you start, we encourage you to start with our variety kit to try out our Fuelings. And when you join **OPTAVIA** Premier, you can customize your orders each month and they will be automatically shipped to your door to ensure you don't run out of Fuelings and that you stay in fat burn. You may be eligible for rewards and shipping discounts as you continue on the premier program. So, the only other thing you'll need to buy is the ingredients for your Lean and Green meal."



"I hear what you want to accomplish and am confident that we can help you reach your goals. Are you ready to get started? If you're ready, I'm ready!"

The Wrap Up

Whatever the outcome of the call is, it's tempting to stay chatting if you know your candidate well. Successful Coaches find it's much better to finish strong (along with your Coach if you're on a training call). Make sure you wrap up the call by:

- Showing your appreciation for their time.
- If they're ready to get started: head over to the Coach section for resources on how to help place their order.
- If they're not ready to get started (yet): set up time to reconnect and finish the call.

Reflective questions

After each Health Assessment, ask yourself:

- "What went especially well?"
- "What could I improve on?"
- "How did I deal with objections or questions?"
- "What did I learn for future Health Assessments?"
- "Am I gaining confidence?"
- "On a scale of 1-5, how ready am I to lead my own Health Assessments?"

Common questions

During your Health Assessments, your Client Candidate will likely have questions or require further clarification on elements of the program. Stay on track and be ready for the most common ones with these answers:

"It's too expensive."

This is a very common one. Successful answers include:

"It's ok. Some people feel like it's more than what they typically spend per day. But what we've found is that it's worth the investment and you might actually find the overall impact is cost neutral. You may not in fact be spending any more than you were before."

This approach can often reveal the real reason for their reluctance. If cost is still a problem, try asking:

"If money wasn't an issue, would you be ready to get started now?"

"I need more information to make a decision."

"No problem! What extra information can I provide or clarify?"

Just like cost-related objections, this will reveal the gap that you'll need to try and close.

"I need to talk to my spouse."

"Can you think of anything else that would be helpful to share with them?"

This will often reveal the real reason for their reluctance, which will almost certainly be cost or information related - see above.

For almost any objection:

"You know, I had another Client that said the same thing. They felt that (restate the objection), but what they found was (state the favorable outcome)."

Another approach here is to revisit the Client's health goals and remind them of these.

Check out this video for extra support on addressing Common Questions:
bcove.video/3cEgLvV

After the Share

If the Client Candidate is not ready to sign up - relax, it's OK! Here's what you can do:

Following up

Try to set a date and time to revisit the conversation. If this doesn't feel right in the moment, use your judgement, but be sure to:

- Be timely and considerate. 1-2 days is a good time to wait before checking back in with someone.
- Use your common sense to give your Client Candidate time to reflect on what you discussed during the Health Assessment, but don't let it fizzle out either.

How to follow up

When following up, use what you learned in the Health Assessment in a way that's relevant to your Client Candidate.

Here are some ways you can personalize your follow up:

- Get a sense of what else is going on in their lives and how they're doing. If you're connected on social media, you can send them a direct message or post a comment.
- When it feels natural, highlight and revisit their why(s) and see how this might help bridge the gap between where they are now and where they want to be.
- Send before and Now pics or video testimonials of another Client who was in a similar position or who had similar goals. See below for some examples and ask your Sponsor / Support Team for additional resources.

How to stay organized:

- Keep notes from your conversations so that you can easily pick up where you left off, and dig deeper into their why(s) when you need to.
- Set a schedule so that you don't lose track of Client Candidates.
- Ask your Support Team for the best resources to send to Client Candidates who aren't ready yet.

Share resources

Watch this sample Health Assessment to see what it's like:

<https://bcove.video/3jf52WP>

Try sharing these video testimonials with Client Candidates:

Dawn was unhappy about her weight until she discovered **OPTAVIA** and lost 45 lbs*.

Share this Story:

bcove.video/3jJX744



Shirley lost 200 lbs two years ago.* She reveals what got her started on her journey to become a Coach.

Share this Story:

bcove.video/3icVhHt



Corey's journey to lose 25 lbs and become a Coach began with a picture his daughter drew of him.*

Share this Story:

bcove.video/2EH3O7R



In 2014, Yvonne was 80 lbs heavier.* She explains how the **OPTAVIA** community helped her.

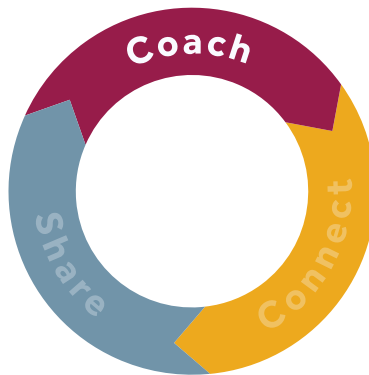
Share this Story:

bcove.video/3ibEPan



*Average weight loss on the Optimal Weight 5 & 1 Plan® is 12 pounds.

3. Coach



Congratulations - you've signed up your first Clients! Now it's time to begin coaching them to better health. Your Training Coach & Support Team will be helping you make sure everyone gets off to a great start.

Here's what you can expect to be doing with your Clients:

- **Making sure** their first orders are placed properly (see below).
- **Setting them up** for success with our Welcome email.
- **Tracking their first order** and preparing them to start the program.
- **Celebrating** the end of Week 1 with them and setting up their weekly check-in call.

Then it's really just a matter of continuing with the above.

As you begin supporting Clients you'll start to see how simple this process can be.

Once again, welcome to the family!

How to facilitate your Client's first order

You should assist your Client in placing their first **OPTAVIA** order. Connect with your Training Coach or Support Team if you have any questions and for information on how to best facilitate.

Clients love the convenience of **OPTAVIA** Premier - our autoship program, so be sure to talk to them about it and explain how it works. **OPTAVIA** Premier is a convenient way for Clients to enjoy savings and rewards when they sign up for monthly billing. They'll receive an **OPTAVIA** Premier order each month unless they change the shipping date or cancel their membership.

If your Client asks for help or assistance in creating an account or placing an order, during this process, they may trust you with their credit card information. So please remember to review and follow this Guidance on Handling Payment Card Information.

Finally, if you do help your Client place their order, you should send them a message confirming the details.

How to integrate a new Client

- Your Client should have received the New Client Welcome Message. If they didn't, you can share it via Coach Answers.
- Add your Client to your Client Support Page if you have one.
- Review the checklist on your Client's Health Assessment and confirm with your Training Coach which steps apply to this Client.
- Organize your Client's Health Assessment - which can be hard copies in your binder or digital copies on your device.
- Store each Client's contact details in your smartphone.
- Set up your **OPTAVIA** Connect Site - talk to your Training Coach for help with this.

How to prepare a new Client for the program

After your Client's order has been placed, you should send them their Welcome Message. Then, it's time to officially welcome your new Client to **OPTAVIA**. Be sure to validate and compliment their decision to get healthy. After all, this is the start of their lifelong transformational journey! Here's how you can make them feel welcome and set them up for success:

- Ask your Client to let you know when their Fuelings arrive and set a date to start the program. Let them know that as a brand new Client, it may take some time for their first order to process.
- Direct them to their Welcome Message and review some items they'll need to pick up for when they start:
 - A **food scale** to weigh lean protein.
 - A **digital scale** to track their progress.
 - A **measuring tape** to track their waist, arm, thigh, chest, & hip sizes.
- Encourage them to download the Habits of Health App.
- You may also want to share *Your LifeBook: The Elements Video Series*.

Coaching a new Client

Great news! Your Client's first order has arrived and they're ready to get started.

Here's how you can support them through their first week:

The day before starting

Getting your Client off to a successful start on the first day is vital. You'll want to have a quick check-in call with your Client the day (or night) before they begin. But before that, your Client has a little bit of homework to do! Ask them to watch the Journey Kickoff Video and take a look at the **OPTAVIA** Guide. Then connect with them to answer any questions they may have.

Here are a few things to cover in your check-in the day before your Client starts:

- Motivate them by reviewing their goals from the Health Assessment. Encourage them to write down their why(s) in a highly visual place, like the bathroom mirror.
- Ask your Client to review the **OPTAVIA** Guide. Specifically, pages 14-21 that focus on the Optimal Weight 5 & 1 Plan®. If they're on another Plan (for example, the Teen Plan, Nursing Mothers Plan, 4 & 2 & 1 Plan, etc.) then refer them to the appropriate Guide.
- Remind them to take a 'Before' photo as well as their measurements
- Set up a check-in time for Day 1

Days 1-4:

During your Client's first week, check in with them daily - ideally in the afternoon or evening. As their Coach, be thoughtful about what motivation they might need to stick with the program. Offer tips from your own experience, be consistent with your check-ins, and keep up the positivity.

Day 1: The first day!

Your Client may be feeling excited and nervous. So on your call, you should:

- Ask about any challenges or areas of confusion so that you can provide support.
- Remind your Client of their why(s) from the Health Assessment.
- Celebrate your Client's commitment and make sure they have what they need to be successful tomorrow - establish trust, rapport and accountability.



Days 2-4

The first few days may be an adjustment for your Client. So on these calls, be sure to:

- Celebrate your Client's commitment and continue to remind them of their why(s).
- Remind your Client to stay hydrated & eat every 2-3 hours and within 1 hour of waking up.
- Ask if they've had the chance to explore your Client Support Page.
- Schedule time the next day.
- You'll find some additional tips for the first few days on the program in the Health Assessment.

Days 5-7

If your Client has entered fat burn, they may be feeling energized and excited to keep up with the benefits of their new routines. Use your best judgment to decide whether they still need daily support and reiterate the questions and encouragement above as required.

After the first week, check in and schedule the Week 1 Celebration Call with your Training Coach or Support Team member.

Week 1 Celebration Call

Celebrate your Client's milestone and continue supporting them as they keep up the healthy habits they've started to form. The Week 1 Celebration Call is a short three-way call between you, your Client and your Training Coach or Support Team member that:

- Recognizes your Client's success and commitment in the first week.
- Shows your Client that they have support from the entire **OPTAVIA** Community.
- Provides a great opportunity to invite your Client to start considering becoming an independent **OPTAVIA** Coach.

Here's a checklist for the Week 1 Celebration Call:

- Introduce your Client to your Training Coach or Support Team Member and share their success
- Introduce your Training Coach to your Client, they will lead the conversation and likely cover:
 - Encouraging them to add their name in their *LifeBook* and take a look at the first 5-6 pages.
 - How to refer people who might be inspired by your health journey and want to get healthy themselves.
 - Recap next steps

Coach resources

Moving forward after Week 1, you will want to check in with your Client once a week. You'll want to use your Client's *LifeBook* and the accompanying **OPTAVIA** Coaching Guide for the Habits of Health® Transformational System.

As your Client moves into weeks 2 and 3, the Dining Out Guide and the **OPTAVIA** Vegetable Conversion Guide can also support your Client's journey.



Social Media

As an **OPTAVIA** Coach, social media is the perfect tool for you to live your life out loud. It's all about authentically sharing your own personal journey, while meeting and inspiring others to join our **OPTAVIA** Community.

How to prepare for your Facebook launch

Get Active

Getting active on Facebook introduces you to all kinds of like-minded people. Sharing your story in small pieces and mixing it with your everyday life is a great way to begin. You could be having fun with your family or pet, playing outside with your kids, taking a selfie on your way to work - or even posting a motivational quote or recipe you enjoy.

As people comment on your posts, try to reply within 24 hours. The goal here isn't to talk about the program, it's about meaningfully connecting with new people.

Make a list and reach out

As your confidence builds, keep a list of 25 or more people you'd like to connect with and eventually share the program with. Take a look at their Facebook pages and comment on a recent post.

Afterwards, try following up with a private message - say hi and start a personal conversation.

Our Coaches have shared these tips that have helped them succeed:

- Be consistent, succinct, and intentional.
- Keep all posts inclusive and positive.
- Live a life that reflects the Trilogy of Optimal Health.
- Post daily, share the best bits of life in photos.
- Try to add new friends everyday.
- Link your cell phone to your Facebook contacts.
- End messages with a question to keep the conversation going.

Launching on Facebook

Launching on Facebook is an exciting milestone for Coaches. It helps you:

- Share your success with the program.
- Build meaningful relationships with people who may want to join you, support you, and introduce you to even more people!

Decide when to launch

Talk to your Sponsor to decide the best time for you to launch. You'll want to be sure that you can respond to likes, comments and private messages promptly.

Make sure your posts are public

Your posts will get far more exposure if your privacy settings are set to public:

- From the dropdown menu on the far right side of the Facebook navigation, click the dropdown and select Settings & Privacy.
- In Settings & Privacy, select Settings.
- In Settings, select Privacy and then click on Who can see your future posts?
- In Who can see your future posts? Select the dropdown menu and choose Public.

Create a Before and Now picture

Try creating an eye-catching Before and Now picture that showcases your success. Add a snappy caption, but always be sure to:

- Use the appropriate weight-loss disclaimer on any photos you share.
- Follow **OPTAVIA** guidelines. Please see Section 5.10 of the Official **OPTAVIA** U.S. Policies for more details.

There are three types of launch posts:

- A Before and Now picture to show your progress.
- Pictures and thoughts on your journey so far if you're not quite ready for your Before and Now picture.
- Announcing that you've become an independent **OPTAVIA** Coach so that you can pay the gift of health forward.

Make use of private messaging

Private messaging works best to respond promptly to people who've liked or commented on your post or reached out directly. It starts conversations and builds relationships! Here's an example (feel free to change it to fit your style):

"Hi, <NAME>, I'd love to chat with you about what I'm doing. Are you asking for yourself or someone you care about?"

Start a tracking sheet

Can you add these people to your tracking sheet?
Here are some possible categories:

- **Potential Coaches/Clients:** People that YOU would like to share physical health and/or coaching with.
- **Showing Interest:** Not scheduled yet.
- **Health Assessment done but not ready yet:** Continue to follow up.

Move it to the phone

Can you move the conversation to the phone?
Here are a few ways you could do it:

Responding to asks for information:

- Show gratitude for the comment/message and share how you're feeling about your health.
- If the person responds, try to schedule a call. You need to find their WHY before you can share the HOW.

Responding to congratulatory comments or likes:

- Start a private conversation - find a way to make it more personal.
- Keep chatting and build trust. If they ask how you're getting healthy, follow the examples above.
- If the person responds, try to schedule a call.

What if you don't get a message back after your initial response?

If someone doesn't respond, Relax! It's no big deal. Put them on your list to follow up with. They are interested or they wouldn't have commented or reached out. Let the timing be right for them.

- Reach out again with something personal.
- Comment at least once a week on their posts.
- Reach out with another thoughtful private message at least once a week to continue the conversation.
- If they ask how you're getting healthy, use the examples and process for Congratulatory comments and likes (see above).
- When they're ready to talk, they'll reach out and ask.

Common questions - and how to respond

As always, feel free to change any of these examples to fit your style.

"What are you doing? / What's it called? / How much does it cost."

Try a private message like this:

"We have several different programs available depending on what you're looking to accomplish. If we can chat about your goals, I could determine the right one for you. The call will only take about 20 minutes. Let me know what works for you in the next day or two!"

"Can you send me the website or a brochure?"

"I don't have much to send, but if we could chat about your goals, I can give you a better idea of cost and the right program for you. Let me know what works for you in the next day or two!"

Social media resources

- Check out our guide to Grow your Facebook friends.
- Make sure you're aware of the disclaimers required for posting about your weight loss journey. Please see Section 5.10 of the Official **OPTAVIA** U.S. Policies for more details.
- Our Facebook Group: Transformation Stories to Share is full of inspiring stories from our **OPTAVIA** Community that you can share with potential Clients.



Coach Partners

As you onboard Clients and start to coach them during your first 30 days, you may find that Clients will:

- Express interest in becoming an independent **OPTAVIA** Coach like you,
- Begin referring other Client Candidates to you, or
- Show exciting potential to become a Coach

When any of these happen, ask your Coach Candidate if they're interested in learning more. If they're interested, you can share the video resource below.

Then, check in with your Coach or your Support Team to learn how you can explore coaching with your Clients. To get a sense of what Training a new Coach looks like, take a look at this Checklist for Training Coaches.

Here are some talking points that you can share with potential Coaches:

"Hi, <NAME>, I'm excited that you're interested in exploring the coaching opportunity, so I'm sharing this short video (<https://bcove.video/2GF15L>) with more details. After you've watched it, let me know what questions you have and we'll chat more!"

"Hi, <NAME>, I'm so glad you've been sharing **OPTAVIA** with others and really appreciate you pointing them in my direction. So I was wondering if coaching might be an opportunity you'd like to explore?"

If they answer yes:

"Here's a short video (<https://bcove.video/2GF15L>) with more details. After you've watched it, let me know what questions you have and we'll chat more!"

"Hi, <NAME> You're doing such a great job on the program, and making incredible progress. It's making me think that you'd be an amazing Coach. Is that something you'd be interested in?"

If they answer yes:

"I'm sharing a video (<https://bcove.video/2GF15L>) so you can learn more about coaching. And I'm happy to chat more about it if you like!"



The OPTAVIA Coach

Congratulations on becoming an independent **OPTAVIA** Coach!

You've joined a team that's changing the world, one healthy habit at a time. We have the privilege of helping thousands of people achieve a higher level of health and wellbeing in their lives. In this section, we share a bit more about what it means to be an independent **OPTAVIA** Coach.

We are agents of change. People are at their most fulfilled when they're pursuing what means most to them in life.

We understand that people can feel powerless in shaping their physical, mental and financial wellbeing.

Which is why OPTAVIA inspires and equips you to live optimal days through a philosophy and proven system grounded in what works.

As Coaches we are enthusiastic about the potential we see in people, interested in the dreams they want to fulfill, purposeful in promoting optimal living and magnetic because the results people achieve with us are simply extraordinary.

We lead from the future - we act in the now.

We take responsibility - we play above the line.

We seek growth - we embrace obstacles as the way.

We connect authentically - we cultivate trust.

We awaken potential - we transform masterfully.

We deliver extraordinary results - we serve to better humankind.

We are for people who are ready to take personal responsibility for their optimal health and life.

We're so happy to have you join our incredible Coach Community. We know you'll do great things. Together with the Coaching Guide for the Habits of Health Transformational System, you've got everything you need to start your journey.



OPTAVIA®

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Here's a list of the things you'll need to do and be aware of as you get started. Be sure to ask your Training Coach about ordering your Business Kit.

Download or print this checklist:

Print out:

A copy of the [Contact List](#)

Several copies of the [Health Assessment Form](#)

Connect

Make a short list of people to invite to a Health Assessment training call with your Training Coach

Share

Schedule Health Assessment training calls with your Client Candidate and Training Coach

Take part in the Health Assessment training calls with your Training Coach and Candidates

Debrief with your Training Coach right after your Health Assessment training calls

As needed, schedule follow-up calls with Client Candidates to see if they're ready - and then organize your tracking system as needed

Coach

Set up your **OPTAVIA** website and your W9/**OPTAVIA** Pay

Help your Client place their first order and send them the Welcome Message with links to resources and reference information

Confirm the arrival of your Client's fuelings and your Client's first day

Check in with your Client daily on Days 1-4

Check in with your Client as needed on Days 5-6

Check in with your Client on Day 7 and schedule time for their Week 1 Celebration Call

Encourage your Client to open their Lifebook, write their name in it, and begin to explore

Contact List

Please take some time to make a list of the individuals that you would like to introduce to **OPTAVIA®**. These may be people you already know well, or those you would like to get to know a little better. They may be in need of a healthy Community, ready to embark on their road to optimal health or simply looking to create their best life!

NAME	PHONE #	EMAIL	CONTACT DATE	NOTES

Reach out, connect, and update this list daily. Your transformation is an inspiration to others!

NAME: _____ EMAIL: _____

CLIENT ID NUMBER: _____

PREFERRED METHOD OF CONTACT: _____

PHONE: _____

"It's great speaking with you today and I'm excited to see if I can assist you with your goals. Before we can determine if one of our Programs is right for you, I'd like to ask you a few questions to learn about you and your health goals. Does that sound good?"

STEP 01: AWAKEN

1 *I would love to hear what you would like to accomplish with your health. (Weight-loss, improved sleep, better response to stress, etc.)*

2 *What is your main motivation for wanting to make changes to your health? (Relationships, activities, how you will feel, etc.)*

3 *Can you tell me about a time in your life when you were healthier? What has changed between then and now?*

4 *Tell me about your health: Do you have any allergies or medical conditions that could influence which Program we choose?**

*Reminder: We recommend that Clients contact their healthcare provider before starting and throughout their weight loss journey.

5 *Are you Pregnant?* YES NO *Are you nursing?* YES NO *If yes, how old is your baby?* _____

<p>6 <i>Are you taking any medications for:</i></p> <ul style="list-style-type: none"> <i>Diabetes</i> <i>High Blood Pressure</i> <i>Lithium*</i> <i>Thyroid[†]</i> <i>Coumadin (Warfarin)[‡]</i> <i>Other medications:</i> <p>_____</p> <p>_____</p> <p>_____</p>	<p>7 <i>Do you have the following:</i></p> <ul style="list-style-type: none"> <i>High Blood Pressure</i> <i>Diabetes Type I</i> <i>Diabetes Type II</i> <i>Gout</i> <i>Gluten Intolerance or Sensitivity</i> <i>Soy Allergy or Intolerance</i> <i>Food Allergies</i> <i>Other</i> <p>_____</p>
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8 *Now that you've shared some of your current health goals, I want to give you a quick idea of what is possible.*

Share YOUR story (or someone else's). Take 90 seconds or less to share the pieces of your story or a Client's story that will connect with this person.

*Lithium: The healthcare provider may wish to adjust frequency of lab work for the Client and monitor.
[†]Thyroid Medications: The healthcare provider may wish to monitor thyroid hormone levels while the Client is on the Program and adjust medication.
[‡]Coumadin (Warfarin): The healthcare provider may wish to review food choices, conduct lab work and/or adjust medication.

Remember: If a Client answers affirmatively to any of the questions to the left, consult the **'Health Assessment Guidelines: OPTAVIA Program Considerations'** page before suggesting a Program.

STEP 02: DAILY ROUTINE & HABITS

SLEEP & ENERGY

How many hours of sleep do you get in a typical night? _____

How would you describe the quality of your sleep? _____

On a scale of 1-10, what is your energy level throughout the day? _____

MOTION

How would you describe the quantity & quality of the activity you do each week? _____

How many hours a day do you sit? _____

How many days a week do you exercise? (0 - 7 days) _____

What types of physical activity do you enjoy? _____

MIND

On a scale of 1-10, how fulfilled are you? _____

On a scale of 1-10, how much do you worry? _____

What area of your life tends to be the biggest stress for you? _____

What do you do for work? _____

On a scale of 1-10, how much do you enjoy what you do? _____

FOOD & HYDRATION

How many meals and snacks do you eat per day? _____

When do you eat your first meal of the day? _____

How many times a week do you eat out? And where? _____

How many ounces of water do you drink per day? _____

Do you drink other beverages? Coffee, soda, alcohol, tea, etc.

If so, how often and how much? _____

WEIGHT MANAGEMENT

Are you comfortable sharing your age? _____

How tall are you? _____

How much do you currently weigh? _____

What would you consider to be a healthy weight for you? _____

Have you tried to lose weight in the past? _____

What has been difficult for you about losing and maintaining weight? _____

SURROUNDINGS

On a scale of 1-10, how healthy would you rate your surroundings?

(Does this person have healthy and active friends, supportive family, keep junk food in the house, etc.) _____

Is there anyone in your life who would like to get healthy with you?

Is there anything else you think I should know about your health?

Thank you for sharing, now I'd like to tell you how our Program could help you achieve your goals.



NEXT STEP: Refer to the 'Health Assessment Guidelines: Sharing Script'

CLIENT TRACKING INFORMATION:

HOW DID WE MEET?	
LEAD	REFERRAL OF:

STARTING WEIGHT:

GENDER:		AGE:	
CURRENT WEIGHT:		CURRENT BMI:	
DESIRED WEIGHT:		DESIRED BMI:	
HEALTHY WEIGHT RANGE:			
HEALTH ASSESSMENT DATE:			
ORDER DATE:		START DATE:	

ADDRESS:	
CITY/STATE/ZIP:	
TIME ZONE:	

COACH CHECKLIST:

- RECOMMEND CLIENT CONSULT THEIR HEALTHCARE PROVIDER BEFORE STARTING A PROGRAM
- CONFIRM RECEIPT OF CLIENT'S WELCOME EMAIL (BEFORE & AFTER, MEASUREMENTS AND GUIDE)
- SEND FRIEND REQUEST VIA FACEBOOK, ADD TO FACEBOOK SUPPORT GROUP AND WELCOME THEM
- SEND JOURNEY KICK-OFF VIDEO AND CONFIRM VIDEO WAS VIEWED BEFORE YOU HAVE A BRIEF NIGHT BEFORE CONVERSATION
- ADD CLIENT TO YOUR NEWSLETTER
- SET UP DAILY SUPPORT MESSAGES (VIRTUAL OR TEXT)
- INVITE TO SUPPORT CALLS
- TEACH CLIENT ON HOW TO REFER OTHERS
- SEND OPTAVIA PREMIER ORDER VIDEO WHEN 7 DAY REMINDER EMAIL COMES

COACH TIPS:

As your Client begins their journey to optimal wellbeing, they may feel hungry, tired or irritable as their body adjusts to a new way of eating. While adjusting to intake of a lower-calorie level and diet changes, some people may experience temporary lightheadedness, dizziness or gastrointestinal disturbances.

When speaking to your Clients, here are a few additional tips to make the adjustment period easier into fat burning for your Clients.

You can remind them to:

- Download and use the Habits of Health® App to track their Fuelings and water intake.
- Stay hydrated with water.*
- Consider choosing a start date when you don't expect any social food-centered events.
- Stay busy.
- Approach their health journey, one day at a time.
- Open up *Your LifeBook*, put your name in it & read the introduction, once in a fat burning state.
- Avoid temptations, and stay focused on your health goals.
- Sip on 1 cup of broth or eat 2 dill pickle spears (as needed in the first few days). **If Client has no sodium restrictions.**
- Wait to start exercising for 2 - 3 weeks on the Optimal Weight 5 & 1 Plan®. **We recommend checking with your doctor before starting any exercise program.**

*We recommend drinking 64 ounces of water each day. Talk with your healthcare provider prior to changing the amount of water you drink as it can affect certain health conditions and medications.



HEALTH ASSESSMENT: CLIENT CHECK-IN TRACKER

Make sure to call your Client during the first week per the schedule below!

REMEMBER TO CONTINUE TO CHECK-IN WITH YOUR CLIENT FROM DAY 7 ONWARD _____

Please use the following pages to continue your check-ins. Confirm a weekly check-in day. S M T W T F S

Ask them: *"Have you shared your success with anyone? Are people asking you about your transformation?"*
 When that happens, you can refer those people to me and receive "X" (if you choose to do a referral program on your own to thank people for referrals, please discuss with your Business Coach). Or, because people often prefer to be coached by their friends and family, you may want to consider coaching them yourself. A significant percentage of our Coaches were Clients first who became healthy and then decided to "pay it forward."

	DATE	NOTES:
JOURNEY KICK-OFF CHECK-IN		
DAY ONE CHECK-IN		
DAY TWO CHECK-IN		
DAY THREE CHECK-IN		
DAY FOUR CHECK-IN		
DAY SEVEN CHECK-IN		

TIPS FOR WORKING WITH NEW CLIENTS:

- 1 Place their completed Health Assessment in **Section 2 - 'New Clients'** folder.
- 2 Make sure you have your weekly check-ins with your New Clients, discuss their Health Assessment with them and make a note of their progress.
- 3 Set a Client Support day during the week and graduate all Week 1 - Clients to that day's schedule moving forward.
- 4 Once a Client has been on their Program for one month, move them to **Section 3 - 'Active Clients'** folder.

WEEK 2 CHECK-IN		
CHECK-IN		
WEEK 3 CHECK-IN		
CHECK-IN		
WEEK 4 CHECK-IN		
CHECK-IN		

	DATE	NOTES:
WEEK 5 CHECK-IN		
CHECK-IN		
WEEK 6 CHECK-IN		
CHECK-IN		
WEEK 7 CHECK-IN		
CHECK-IN		
WEEK 8 CHECK-IN		
CHECK-IN		
WEEK 9 CHECK-IN		
CHECK-IN		
WEEK 10 CHECK-IN		
CHECK-IN		
WEEK 11 CHECK-IN		
CHECK-IN		
WEEK 12 CHECK-IN		
CHECK-IN		

CONTINUE CHECK-INS WITH YOUR ACTIVE CLIENTS TO ASSIST THEM ON THEIR JOURNEY THROUGH OUR HABITS OF HEALTH TRANSFORMATIONAL SYSTEM.

Blank 'Client Check-In Trackers' are available for download on COACHANSWERS.OPTAVIA.COM