



Client and Health Coach Support System

HOW TO USE THE CLIENT & HEALTH COACH SUPPORT SYSTEM

The Client and Health Coach Support System is an organized way to keep track of your Candidates, Clients, and Health Coaches and help them progress. It is arranged as a series of sections and is designed to help you organize your acquisition and coaching efforts.

CONTENTS

This System contains the following materials:

- [Instructions](#) on how to use the Support System
- Tracking Forms:
 - Blank [Wellbeing Evaluation](#)
 - Blank [Contact List](#)
 - Blank [Wellbeing Tracker](#) (For Coaches or Health Coach Candidates or Clients and Client Candidates)
 - Blank [Health Tracker](#) (For Client Candidates or Clients)
 - Blank [Health Coach/Business Coach Tracker](#)
 - Blank [Connections List](#)
- Section 1 – Candidate Follow-Up (Staying Connected)
- Section 2 - New Clients
- Section 3 – Active Clients
- Section 4 – New Health Coaches to Senior Coach
- Section 5 – Senior Coach to Executive Director (via the Business Path)
- Section 6 – Inactive Clients

PROCESS

1. START BY WORKING ON YOUR CONTACT LIST:

As part of your [Action Plan](#) to get started, you'll begin filling out your [Contact List](#) and identify your Top 10 Candidates.

2. ONCE YOU BEGIN SHARING TAKE SHAPE FOR LIFE WITH YOUR CANDIDATES, YOU'LL HAVE THREE POSSIBLE OUTCOMES:

- They'll say "yes" and become a [new Client](#) or new Health Coach.
- They'll say "maybe." They'll remain a Candidate and go into the [Candidate Follow- Up](#) Section and on your [Connections List](#).

They'll say "no, thank you" and can possibly become a source of other Candidates for you.

CLIENTS

A. NEW CLIENT

- ✓ Continue to fill out a [Wellbeing Tracker](#) or [Health Tracker](#) form, attach it to their [Wellbeing Evaluation](#) (if completed).
- ✓ Put the form in **Section 2 – New Clients**.
- ✓ During your weekly Client Check-ins, refer to their Tracker and record progress.
- ✓ Once the Client has been on their program for two weeks, move them to **Section 3 – Active Clients**.

B. BECOMES HEALTH COACH

- ✓ If a Client decides to become a Health Coach, start a **Health Coach/Business Coach Tracker** and put it in **Section 4 – New Health Coach**. Continue to leave their **Wellbeing Tracker** in **Section 3 – Active Clients** (since you'll still be coaching them)

C. INACTIVE

- ✓ If a Client becomes inactive (is no longer ordering), move them to **Section 6 – Inactive Clients** so that you can retain their information should they decide to come back at some point.

HEALTH COACHES

A. NEW HEALTH COACH AND NEW CLIENT AT SAME TIME

- ✓ Complete a [Wellbeing Tracker](#) and place it in **Section 2 – New Clients**.
- ✓ Complete a [Health Coach/Business Coach Tracker](#) and place it in **Section 4 – New Health Coaches – Senior Coaches**.

B. CLIENT BECOMES A HEALTH COACH

- ✓ Complete a [Health Coach/Business Coach Tracker](#) and place it in **Section 4 – New Health Coaches – Senior Coaches**.

NOTE: During your Mentorship calls, refer to their Trackers and record progress.

C. REACHES SENIOR COACH

- ✓ Move them to **Section 5 – Senior Coach to Executive Director**.

CANDIDATES WHO NEED ADDITIONAL FOLLOW UP:

- ✓ Add them to your Connections campaign.
- ✓ If you have their completed [Wellbeing Evaluation](#) and/or have started one of the Trackers, put it in **Section 1 –Candidate Follow-Up**.
- ✓ Stay connected with your Candidates who need follow up and check interest periodically.
- ✓ When they decide to get started, put them in the appropriate section and move them through the system accordingly.

SETTING UP THE SYSTEM

Here are three options for setting up the Client and Health Coach Support System:

1. DIGITAL METHOD: ELECTRONIC FOLDERS

Instructions:

- ✓ Create a directory on your computer titled “Client and Health Coach Support System”.
- ✓ Download the Instructions, Contact List, and blank Trackers in the directory.
- ✓ Create 6 folders in the directory, each one corresponding to each Section.
- ✓ Move the electronic Tracking Forms from one folder to the next as the person progresses.

2. PAPER METHOD: 3-RING BINDER

What you'll need:

- ❖ Binder
- ❖ Colored Card Stock (7 pieces) or plastic dividers
- ❖ Three-Hole punch
- ❖ Blank tabs (if desired)

Instructions:

- ✓ Print out the Section Covers – see below (suggestion: print on colored cardstock).
- ✓ Print out all forms (three-hole punch).
- ✓ Arrange in a 3-ring binder.
- ✓ The Instructions, Contact List, and blank Trackers go before **Section 1** in the binder.
- ✓ Each Section becomes a tab.
- ✓ Move the filled out Trackers from one Section to another as the person progresses.

3. PAPER METHOD: FILE FOLDERS

What you'll need:

- ❖ 7 plain manila files
- ❖ Glue or stapler

Instructions:

- Print out the Section Covers and all forms.
- Attach the Section Covers to individual files.
- Put the Instructions, Contact List, and blank Trackers in the first file.
- The other 6 files become each Section.
- Move the filled out Trackers from one file to the next as the person progresses.

NAME _____

DATE _____

Transform Yourself

Making Optimal Health a Reality



Healthy Body

	Bad	Poor	Fair	Good	Optimum					
Weight Status	1	2	3	4	5	6	7	8	9	10
Eating Habits	1	2	3	4	5	6	7	8	9	10
Physical Activity	1	2	3	4	5	6	7	8	9	10
Sleeping	1	2	3	4	5	6	7	8	9	10
Relaxation	1	2	3	4	5	6	7	8	9	10
Safe and Healthy (Work/Home/Play)	1	2	3	4	5	6	7	8	9	10

Score ____ / 60



Healthy Mind

	Bad	Poor	Fair	Good	Optimum					
Most Relationships	1	2	3	4	5	6	7	8	9	10
Attitude at Work	1	2	3	4	5	6	7	8	9	10
Meaning and Purpose	1	2	3	4	5	6	7	8	9	10
Spirituality Time	1	2	3	4	5	6	7	8	9	10
Community Service	1	2	3	4	5	6	7	8	9	10
Hobbies/Fun	1	2	3	4	5	6	7	8	9	10

Score ____ / 60



Healthy Finances

	Bad	Poor	Fair	Good	Optimum					
Abundance	1	2	3	4	5	6	7	8	9	10
Resources to Minimize Stress	1	2	3	4	5	6	7	8	9	10
Money Management	1	2	3	4	5	6	7	8	9	10
Money to Do What You Want	1	2	3	4	5	6	7	8	9	10
Resources to Create Memories/Experiences	1	2	3	4	5	6	7	8	9	10
Community Contribution	1	2	3	4	5	6	7	8	9	10

Score ____ / 60



Where Are You Now?

	Bad	Poor	Fair	Good	Great	Optimum
Physical Health	10	20	30	40	50	60
Mental Health	10	20	30	40	50	60
Financial Health	10	20	30	40	50	60

What Was Your Cumulative Score?

	Failing	Poor	Surviving	Above Average	Thriving	Optimum
Overall Well-Being	30	60	90	120	150	180

CONTACT WORKSHEET

[illegible]

Place a star next to the 10 Candidates you feel may be most interested in what we have to offer (or you are most comfortable sharing with) and review them with your Business Coach.



Wellbeing Tracker

Date: _____

Name: _____ ID#: _____ Phone: _____ Time Zone: _____

Address: _____ City: _____ St: _____ Zip: _____

Gender: ☐ Male ☐ Female Date of Birth: _____ Height: _____ Email: _____

Username: _____ Password: _____

How we met: _____

Career: _____ Family: _____

Wellbeing Evaluation:

Physical Health ____/60

Mental Health ____/60

Financial Health ____/60



What areas do you want to work on first to improve your score?

Healthy Body Goals:

Current Weight: _____ BMI: _____ Goal Weight: _____ Goal BMI: _____

What areas do you want to work on?

☐ Healthy Eating ☐ Healthy Moving ☐ Healthy Sleeping ☐ Healthy Relaxation ☐ Other _____

Reasons for improving in this/these areas?

Healthy Mind Goals:

What areas do you want to work on?

☐ Relationships ☐ Job Satisfaction ☐ Free time ☐ Spirituality ☐ Hobbies ☐ Other _____

Reasons for improving in this/these areas:

What is your stress level 1-10 _____

Healthy Finance Goals:

What area do you want to work on?

☐ Increase my income ☐ Debt free ☐ Savings ☐ Retirement ☐ Child's education ☐ Travel ☐ Home/Car

☐ Community Contribution ☐ Other _____

Reasons for improving in this/these areas:

Preparing for Your Physical Health Transformation:

Do you mind if I ask you a few health related questions? Do you have.....

☐ High Blood Pressure ☐ Heart Disease ☐ Thyroid Disease ☐ Seizures ☐ Diabetes ☐ Type 1 ☐ Type 2

Are you.... ☐ Taking a Blood Thinner ☐ Taking Lithium ☐ Taking Diuretics ☐ Pregnant or Breastfeeding

Recent acute illness: _____ Food allergies: _____

Current Physical Activity (Type):

Frequency: ☐ Daily ☐ 3-5 days/week ☐ 1-2 days/week ☐ Never Sleep (hours per night): _____

Who is going to be a support for you? _____ Who wants to get healthy along with you? _____

Occupation: _____ (hours per day): _____

Is there anything else you would like to share that may assist me to help you?

Name: _____ ID#: _____ Phone: _____ Time Zone: _____
Username: _____ Password: _____

Date Ordered Program: _____ Start Date: _____ Updates own BeSlim®? ☐Yes ☐No
Program: ☐Optimal Weight 5 & 1 ☐Optimal Health 3 & 3 ☐Nursing Mothers ☐Seniors ☐Diabetes
☐Other (please explain): _____

Habits of Health System ordered: ☐Yes ☐No Completed Health Assessment: ☐Yes ☐No Facebook Account: ☐Yes ☐No
Online Support Community: _____ Added to newsletter: ☐Yes ☐No
Sent a referral packet/information: ☐Yes ☐No

Biggest reason for achieving Optimal Health: _____

Date	+/- lbs	Notes

Name: _____ ID#: _____ Phone _____ Time Zone _____
 Address _____ City _____ St _____ Zip _____
 Username _____ Password _____ Email _____
 Date of Birth _____ Gender _____ Age _____ Height _____
 Date Ordered Program: _____ Start Date _____ Updates own BeSlim® orders: ☐ Yes ☐ No
 Program: ☐ Optimal Weight 5 & 1 ☐ Optimal Health 3 & 3 ☐ Nursing Mothers ☐ Seniors ☐ Diabetes
☐ Other _____

Ordered the Habits of Health System: ☐ Yes ☐ No Completed Health Assessment: ☐ Yes ☐ No
 Facebook Account: ☐ Yes ☐ No Online Support Community: _____
 Added to newsletter: ☐ Yes ☐ No Sent a referral packet/information: ☐ Yes ☐ No
 Completed the Wellbeing Evaluation: ☐ Yes ☐ No

Biggest reason for achieving Optimal Health _____

Healthy Body Goals:

Current Weight: _____ BMI: _____ Goal Weight: _____ Goal BMI: _____

Which areas do you want to work on?

☐ Healthy Eating ☐ Healthy Moving ☐ Healthy Sleeping ☐ Healthy Relaxation ☐ Other _____

What is your stress level 1-10: _____

Reasons for improving in this/these areas: _____

Notes _____

Preparing for Your Physical Health Transformation:

Do you mind if I ask you a few health related questions? Do you have:

☐ High Blood Pressure ☐ Heart Disease ☐ Thyroid Disease ☐ Seizures ☐ Type 1 Diabetes ☐ Type 2 Diabetes

Are you.... ☐ Taking a Blood Thinner ☐ Taking Lithium ☐ Taking Diuretics ☐ Pregnant or Breastfeeding

Recent acute illness: _____ Food allergies: _____

Current Physical Activity: _____

Frequency: ☐ Daily ☐ 3-5 days/week ☐ 1-2 days/week ☐ Never Sleep (hours per night): _____

Who is going to be a support for you? _____ Who wants to get healthy along with you? _____

Occupation? _____ (hours per day): _____

Is there anything else you would like to share that may assist me to help you? _____

Health Tracker

[illegible]



Health Coach Tracker

Date: _____

Name: _____ ID#: _____ Phone: _____ Time Zone: _____

Address: _____ City: _____ St: _____ Zip: _____

Gender: ☐ M ☐ F Date of Birth: _____ Height: _____ Email: _____

Username: _____ Password: _____

Level of Coach to you: _____ Their Business Coach: _____

Kit Purchase Date: _____ CAB expires: _____

Wellbeing Evaluation Scores: **Body** (___/60) **Mind** (___/60) **Finances** (___/60)

Q: Why are they excited about being a Coach (their "Why")? _____

Q: What are their most important/immediate business goals? _____

Skills & Activities to Achieve Senior Coach	Do I Need Help to Teach This Skill?	Date Taught	Date Skill Learned	Can They Now Teach The Skill?
Guide through Action Plan in <i>Your Business Guidebook</i> (4 Questions)				
Help them identify their motivation for joining TSFL (write above)				
Guide them on creating a Contact List and Top 10 Candidates (identify Client Candidate, Health Coach Candidate, or Connection)				
Help them create their story (experience) & how to invite				
a) Help with Before After story (What are they excited to share?)				
b) Teach them to invite to interview/presentation				
c) Understand how to leverage your Business Coach (i.e. 3- Way Calls)				
After presentation help them follow up (Ready/Not Yet/Not fit)				
Presentations: Do it for them, do it with them and watch them until ready				
Help with Business Launch				
Discuss possible Social Media launch				
BEST PRACTICES FOR STARTING CLIENTS				
Provide New Client Welcome Email Template				
Teach how to use "Client Support System"				
Teach how to coach Clients into fat burning				
Teach overcoming objections				
Teach Client Story Calls				
Teach staying connected				
How to invite current Clients to a Health Coach Overview				
BUSINESS ADMINISTRATION				
Review <i>Your Business Guidebook</i> and <i>Getting Started Overview</i>				
Explain team coaching model, establish your mentor relationship, and set expectations				
Review earning CAB and Integrated Compensation Plan basics				
Review Office in Motion (if necessary)				
Customize & update co-branded website				
Block time for skill development (weekly calls, books, videos, events)				

Name: _____ ID # _____

Best Phone #: _____

Business Coach Tracker

Skills and Activities to Become an Executive Director via the Business Path	Do I Need Help to Teach This Skill?	Date Taught	Date Skill Learned	Can They Now Teach The Skill?
CONDUCT STRATEGY SESSION : AIM to STAY				
A wakening I ntrinsic M otivation (find what matters most to them)				
S trategies: Plan to reach Executive Director via the Business Path (FIBC) review Goals worksheet in <i>Your Business Guidebook</i>				
T actics (how to carry out your plan)				
A ctions (daily activities and habits)				
Y ou & Y ours (working as a team with your Business Coach)				
Review Business Path (5 & 1 for Business)				
SKILLS FOR SPONSORING NEW HEALTH COACHES				
Identifying Candidates (Expanding your Contact List)				
Approaching Health Coach Candidates: Review how to invite (talking points), role playing conducting 3-ways (i.e. calls, web conference, live events, face to face)				
Presenting the Trilogy				
Following-up with Candidates				
Starting up new Health Coaches				
SKILLS FOR MASTERING EMPATHETIC COACHING				
Asking Questions				
Active Listening				
Building Trust				
Emotional Intelligence				
ADDITIONALSKILLS				
Generating referrals (from Clients, others)				
Coach Clients to transition				
Utilizing social media				
BUSINESS ADMINISTRATION				
Explain value of COPE Certification				
Understanding Team Building and the Integrated Compensation Plan				
"Maintaining Your Calendar & Time Management" conversation				
Encourage participation in weekly Leadership calls and other calls, ongoing trainings, personal development				

Events	Importance Explained	Date Attended	Number of Guests Attending
Local Training			
Regional Event			
Go Global			
Sundance			
National Convention			

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SECTION 1: CANDIDATE FOLLOW-UP (STAYING CONNECTED)**SECTION 1 CONTENTS:**

- Connections List
- Forms for Candidates who need additional follow up.

GUIDELINES:

- ✓ If you have their completed Wellbeing Evaluation and/or have started one of the Trackers, put it in this section.
- ✓ Add them to your Connections campaign.
- ✓ Stay connected and check interest periodically.
- ✓ When they decide to get started, put them in the appropriate section and move them through the system.

SECTION 2: NEW CLIENTS

SECTION 2 CONTENTS:

- Forms for new Clients (from “yes” to two weeks on program)

GUIDELINES:

- ✓ Continue to fill out a Health Tracker or Wellbeing Tracker, attach it to their Wellbeing Evaluation (if completed).
 - Put the form in this Section and organize by your next scheduled contact with them.
- ✓ Refer to “How to Get a new Client Started” and “Supporting your new Clients” for detailed information.
 - Help them select a program and place their first order.
 - Send a Welcome email.
 - Ask them to take a good “Before” photo.
 - Add them to your newsletter and/or online support group (if using).
 - Speak to them the night before they start.
 - Speak to them Days 1 – 4 of their program.
 - Speak to them 2x in week 2, then move to a weekly Check-in
 - Remind them of great support available via the Optimal Health Community
- ✓ During your Client Check-ins, refer to their Tracker and record progress.
 - Refer to “Client Check-in” for detailed information on support.
- ✓ Once the Client has been on the program for **two weeks**, move them to **Section 3 – Active Clients**.

SECTION 3: ACTIVE CLIENTS

SECTION 3 CONTENTS:

- Forms for Clients who have been on the program for 2 weeks or more and are still actively ordering.

GUIDELINES:

- ✓ During your weekly Client Check-ins, continue to record progress on the Tracker form.
- ✓ Teach how to personalize their own BeSlim Club order
- ✓ Ask for referrals/send information on referrals.
- ✓ Explore Health Coaching and full Trilogy.
 - Refer to “Exploring Health Coaching” for detailed information and speak with your Business Coach.
- ✓ When a Client decides to become a Health Coach, start a Health Coach/Business Coach Tracker and put it in **Section 4 – new Health Coach to Senior Coach**.
 - Leave their **Wellbeing Tracker in Section 3 – Active Clients**.
- ✓ If a Client becomes inactive (is no longer ordering), move them to **Section 6 – Inactive Clients** so that you can retain their information should they decide to come back at some point.

SECTION 4: NEW HEALTH COACHES TO SENIOR COACHES

SECTION 4 CONTENTS:

- Forms for Health Coaches who are not yet Senior Coach.

GUIDELINES:

- ✓ If they become a new Health Coach and new Client at the same time, fill out a Wellbeing Tracker and place it in Section 2 – New Clients. Fill out a Health Coach/Business Coach Tracker and place it in this Section.
- ✓ If they are already a Client, leave their Tracker in Section 3 – Active Clients and continue to support them. Fill out a Health Coach/Business Coach Tracker and place it in this Section.
 - The forms in this section should be organized alphabetically.
- ✓ During your Mentorship calls, refer to the Tracker and record progress.
- ✓ Help them create their Action Plan and guide to “Getting Started” section:
 - Work on Contact List,
 - Outline their story/talking points
 - Demonstrate sharing and inviting
 - Teach following up with Candidates
- ✓ Direct to “Client Acquisition and Support” section for trainings, resources, and tools they will need to get to Senior Coach.
- ✓ Once they reach Senior Coach, move to Section 5 – Senior Coach to Executive Director (via the Business Path).

SECTION 5—SENIOR COACHES TO EXECUTIVE DIRECTORS**SECTION 5 CONTENTS:**

- Forms for Senior Coaches to Executive Directors

GUIDELINES:

- ✓ During your Mentorship calls, refer to the Trackers and record progress.
- ✓ Conduct Strategy Session for growing to Executive Directors
- ✓ Teach skills for sponsoring Health Coaches
 - Direct to the “Health Coach Sponsoring” section for trainings, resources, and tools to get to Executive Director and beyond.
- ✓ Discuss skills for mastering empathetic coaching
- ✓ Teach business expansion skills
- ✓ Review business administration needs

SECTION 6 – INACTIVE CLIENTS**SECTION 6 CONTENTS:**

- Forms for former Clients who are no longer ordering.

GUIDELINES:

- ✓ If a Client stops ordering, move them to this file.
- ✓ Retain this information, should the Client choose to restart the program in the future.
- ✓ Stay connected with them and check in periodically.