

Name: \_\_\_\_\_

Date: \_\_\_\_\_

1. Why am I a health coach today and what are my thoughts about my purpose in building a stronger business?

2. Top three key reasons I want to move forward in growing my business:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

3. One year from now, I want to have achieved the rank of \_\_\_\_\_

4. By the end of (month & year) \_\_\_\_\_, I want to achieve the rank of \_\_\_\_\_

5. Why is this rank important? What motivates me most to accomplish it?

6.

Area of Your Life	Accomplishing this GOAL will Impact on My Life & Freedom in which areas?	What are the specific and measurable ways this Freedom will affect and improve my life?
<b>Income</b> ( <i>How</i> )		
<b>Debt relief</b> ( <i>How</i> )		
<b>Opportunities/Options</b>		
<b>Stress Reduction</b>		
<b>Family Life</b>		
<b>Life Perspective</b>		
<b>Time Freedom</b>		
<b>Other</b>		

7. On a scale of 1-10, how motivated am I to reach these goals?

1 2 3 4 5 6 7 8 9 10

8. What does this number reflect? Why did I choose this number instead of a higher or lower number?



### My Current Reality (this month --projected)

Month	
Rank	
Income	
PV*	
FLV	
GV	
SC Lines of Business	
ED Lines of Business	
FIBC Lines of Business	
New Clients	
New Coaches	
New Team Coaches	
Certification	

\*We are always a client of our Coach...

### My Desired Outcome (Next Month)

Month	
Rank	
Desired Income	
PV	
FLV	
GV	
SC Lines of Business	
ED Lines of Business	
FIBC Lines of Business	
New Clients	
New Coaches	
New Team Coaches	
Certification**	

\*\*If not certified...Date to be completed \_\_\_\_\_

### BIG-PICTURE DESIRED OUTCOME!

- When setting goals, Frontline Volume of at least \$10,000 is critical if you desire to grow quickly.
- Coaches that are sprinting to FIBC or National/Global average between \$10,000-\$15,000+ per month FLV.
- Realize it doesn't happen overnight...
  - ◆ It may take a few months to get there, depending on where you are now.
- An ideal place to focus efforts is on signing a minimum of 5 new clients per month, with the goal of adding 7-10 new clients if faster growth is desired.
- Coaches with the biggest impact are starting at 1-3 new coaches per month
  - ◆ This is critical if Global is your goal...

### Let's zero in on where we want to be in 3 months, 6 months, and 12 months, respectively:

Month 3	
Desired Income	
Rank	
FLV	
GV	
New Clients	
New Coaches	
New Team Coaches	
ED Lines of Business	

Month 6	
Desired Income	
Rank	
FLV	
GV	
New Clients	
New Coaches	
New Team Coaches	
ED Lines of Business	

Month 12	
Desired Income	
Rank	
FLV	
GV	
New Clients	
New Coaches	
New Team Coaches	
ED Lines of Business	

1. What are your big-picture goals that are not reflected in the transactional part of your business above and why are they important to you?
2. Which goal is most important to you and **why**?
3. What will it represent to you when these goals are accomplished?

**I have considered the following so far:**

- What do I want?  Where am I in relationship to my goals?  Why do I want these goals?

**IT'S NOW TIME TO CONSIDER WHAT I AM WILLING TO DO TO ACCOMPLISH IT.**

Please rate yourself on a scale of 1-10, with 1 being unhealthy and 10 being most healthy.

**Personal Health Journey**

I am an active client of my health coach, ordering monthly, utilizing OPTAVIA products to assist me to continue moving forward.

1 2 3 4 5 6 7 8 9 10

My nutrition is on point, and I'm moving forward toward my next goal in my physical health:

1 2 3 4 5 6 7 8 9 10

If I'm within 20 lbs. of my healthy weight, I have implemented a consistent exercise plan to assist in moving my health forward:

1 2 3 4 5 6 7 8 9 10

I am personally engaged and active in the client support page. I comment, encourage, post, and use the page to keep myself accountable:

1 2 3 4 5 6 7 8 9 10

I personally attend LIVE (or watch recorded) Habits of Health webinars and/or Client Support Zooms weekly:

1 2 3 4 5 6 7 8 9 10

I have personally worked through, or am in process of completing, the Habits of Health and Companion Guide:

1 2 3 4 5 6 7 8 9 10

I reach out to my health coach or my support team when I need extra accountability or support, even though I'm a coach:

1 2 3 4 5 6 7 8 9 10

Additional comments regarding my personal physical health: \_\_\_\_\_

**Personal Mindset Assessment**

If someone surveyed my family, friends, and acquaintances, what percentage know I'm a Health Coach and can help them:

25%      50%      75%      100%

I am confident in sharing my story in 30 seconds and ending with a question to redirect the conversation to the other person:

1 2 3 4 5 6 7 8 9 10

I am active in and set my notifications on the Facebook Coaching Page. I contribute to it often and offer comments or tips:

1 2 3 4 5 6 7 8 9 10

I believe that this business and my future growth are a result of Time + Consistency + Action = SUCCESS:

1 2 3 4 5 6 7 8 9 10

## **Business-Building Assessment**

Please rate yourself on a scale of 1-10, with 10 being the most consistent action.

I have a candidate list of at least 100+ names of candidates I want to see get healthy and who could use some part of the trilogy:

1 2 3 4 5 6 7 8 9 10

I am starting 3 NEW conversations per day via phone, text, or personal message on social media:

1 2 3 4 5 6 7 8 9 10

I am adding 3 NEW friends on Facebook a day, with a personal hello message to them:

1 2 3 4 5 6 7 8 9 10

I am posting at least 3 times a day with variety, including passion for program, life, health, before/after pictures, and live videos:

1 2 3 4 5 6 7 8 9 10

I attend weekly OPTAVIA Leadership Call, Habits of Health, or Client Support Call, including the weekly training offered by my support team (either live or via a scheduled time to watch it within 24 hours), that I never miss:

1 2 3 4 5 6 7 8 9 10

I follow the system that OPTAVIA and my coach teaches (starting clients with Optimal Favorites Kit that includes HOH system):

1 2 3 4 5 6 7 8 9 10

I have an established weekly day/hours that my clients know I will be phoning them to coach and discuss their health journey:

1 2 3 4 5 6 7 8 9 10

I am active and engaged with my coach (or someone in my support team) via a message or text thread for Meet & Greets, Celebration Calls, etc.:

1 2 3 4 5 6 7 8 9 10

I have hosted a Healthy Happy Hour within the last month, or have one scheduled within the next 30 days:

1 2 3 4 5 6 7 8 9 10

I have a sponsoring mindset, dripping the trilogy with most clients. I ask someone to explore coaching at least 5 times per month. I am confident in the sharing the trilogy:

1 2 3 4 5 6 7 8 9 10

I personally ask my clients who is noticing their success and then following up by asking them for referrals:

1 2 3 4 5 6 7 8 9 10

If I am a newer coach with 5 clients or less, I have used (or am still using) my coach for 3-way calls:

1 2 3 4 5 6 7 8 9 10

### **Business-Building Assessment** (continued)

When completing a Health Assessment, I spend at least the first 10 minutes asking the candidate about personal goals. I then share the 4 components of our program, saving the nutritional component for the end--including how the program works. If appropriate, I always ask if they are ready to get started to place the order:

1 2 3 4 5 6 7 8 9 10

I schedule time each day to give total focus on starting, building, and cultivating relationships with potential clients / coaches:

1 2 3 4 5 6 7 8 9 10

Follow-up is a weekly rock in my schedule. I re-initiate a conversation with every person with whom I have ever shared the program, or anyone who has shown interest but with whom I have not yet had a call or Zoom:

1 2 3 4 5 6 7 8 9 10

I understand that my personal health is the leading indicator of driving my business forward:

1 2 3 4 5 6 7 8 9 10

I complete my MAP every single month and send it to my support team / business coach by the 1<sup>st</sup> of the month for help and review:

1 2 3 4 5 6 7 8 9 10

### **CREATING A STRUCTURAL COACHING PLAN**

I commit to STRUCTURAL COACHING vs EMOTIONAL COACHING for the next \_\_\_\_\_ days/months. This commitment means that I will schedule specific business building (which are often life-changing) activities every day, every week, and every month. I will do these activities faithfully, regardless of whether I "feel" like it.

#### **Daily:**

1. I will start \_\_\_\_\_ new conversations every day. If I miss a day, I will catch up in the next few days, rather than throwing in the towel.
2. I will add \_\_\_\_\_ new friends every day on Facebook (including those people I meet throughout my day). This means that I will be intentional about meeting NEW people every day.
3. I will post at least \_\_\_\_\_ times per day on Facebook and additional social platforms.
4.  I will look for every opportunity to plant seeds and share the FULL trilogy with those who are looking for a solution/opportunity. I will be bulletproof in mindset.
5.  I will stay in a consistent flow of conversation with my support team/business coach and will "raise my hand" when I hit obstacles or have questions.
6. I will check and be active in my Health Coach Support Facebook Group at least \_\_\_\_\_ times per day.
7. I will contribute to my client support group (posting, encouraging others, providing value, and welcoming new clients of other coaches) at least \_\_\_\_\_ times per day.

**Weekly:**

1. I will follow up with potential clients that I have shared program with on \_\_\_\_\_ (day of the week) and will set aside \_\_\_\_\_ hours for this in my schedule as a non-negotiable, indispensable time.
2. I will attend my weekly team training provided by my Global on \_\_\_\_\_ (day) at \_\_\_\_\_ (time), or I will commit to watch the recording within 24 hours of the live training.
3. I will attend weekly Leadership Call (Health Coach Mondays) Every Monday at \_\_\_\_\_ (time), or I will commit to watch the recording within 24 hours of live training.
4. I will provide quality client support to my clients on \_\_\_\_\_ (day(s)) from \_\_\_\_\_ (time) to \_\_\_\_\_ (time). I will not miss my client support time unless my house falls down. I will plant seeds and offer coaching to my clients each week during this client support time (and other times).

**Monthly:**

1. I will create a NEW list of potential clients (*and add to it throughout the month*) by the \_\_\_\_\_ (day) of the month.
2.  I will attend ALL events happening during each month.
3. I will complete my MAP and send it to my support team/business coach by the \_\_\_\_\_ day of the month. (Suggested day is 1st of the month.)
4. I will host, attend, or coordinate at least \_\_\_\_\_ Healthy Happy Hour(s) over the next 90 days.

**MY COMMITMENT**

YES! I am **ALL IN** and committed to following this plan and doing **WHATEVER IT TAKES** to see my goals come to pass...starting **TODAY**. I acknowledge that success depends entirely on my level of consistent action.

\_\_\_\_\_  
Coach

\_\_\_\_\_  
Co-Applicant

Date: \_\_\_\_\_



**OPTAVIA**