

NEW COACH CHECKLIST

Cab Date: _____

Name: _____ ID#: _____

Getting Started:

- Meet & Greet with Business Coach
- Explain 3-way calls

Computer

- Business Tools Page - *Brief explanation/Shortcut*
- OPTAVIA Connect - *Shortcut*
 - Learn - *Login/Brief explanation*
 - Manage Website - *Avatar photo/Web address*
- Personal Website - *Shortcut*
- Add to Beck Team FB Page
- Add to Wood Team FB Page

Generic Health Assessment

- Send Link
- Watch Week 1 of Health Coaching 101

Facebook Training:

- Watch Week 2 of Health Coaching 101
- Guidelines *(on business tools page)*
- Video *(on business tools page)*
- Add to Transformation Page
- Recipe Guidelines *(folder on client support page)*

Client Support:

- Watch Week 3 of Health Coaching 101
- Send Client Email Instructions
- Send Emails

OPTAVIA Pay:

- Explain email they will receive after their first order is placed.
- Watch Week 4 of Health Coaching 101

First 5 Clients

1. Name: _____ ID# _____ _____
 Sent Health Assessment Call scheduled _____ Results: _____
2. Name: _____ ID# _____ _____
 Sent Health Assessment Call scheduled _____ Results: _____
3. Name: _____ ID# _____ _____
 Sent Health Assessment Call scheduled _____ Results: _____
4. Name: _____ ID# _____ _____
 Sent Health Assessment Call scheduled _____ Results: _____
5. Name: _____ ID# _____ _____
 Sent Health Assessment Call scheduled _____ Results: _____

Set Up Personalized Health Assessment

- Send Instructions after 5 clients

Notes: