



OPTAVIA®

Finding Client and  
**OPTAVIA** Coach™ Candidates

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## FINDING CLIENT AND OPTAVIA COACH™ CANDIDATES

One of the most important exercises you must do at the beginning of your business and throughout your career is to create and maintain a working list of at least 100 people to potentially contact regarding **OPTAVIA** either about our Optimal Health Program, the opportunity to become an **OPTAVIA** Coach, or the Trilogy. When you have people to talk to, you have the fuel to grow your business.

### DIFFERENT TYPES OF CANDIDATES

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The full offer in **OPTAVIA** is the Trilogy of Optimal Health: Healthy Body, Healthy Mind, and Healthy Finances. However, it's important to keep in mind that not all Candidates are alike and not all are looking for the same thing at the same time. When sharing **OPTAVIA**, some may be ready to hear about the Full Trilogy immediately. For others, you may want to approach them initially about our programs that address creating a Healthy Body and later offer the Full Trilogy. And, for those Candidates who are business minded and primarily looking for Healthy Finances, you may initially approach them about exploring Coaching.

There are two major activities that an **OPTAVIA** Coach engages in: 1) Acquiring and coaching Clients and 2) sponsoring and mentoring Coaches. When developing your list, it may be useful to segment your Candidates into two areas: Those that you want to share the (a) Full Trilogy or the Opportunity to become a Coach with from (b) those you may want to approach initially regarding our programs for creating Optimal Physical Health.

When putting names on a list, don't worry about how well you know someone or how you might approach that person; you will learn those techniques later. For now, just complete the exercises and write down the names of all the people you know.

### PEOPLE WHO IMMEDIATELY COME TO MIND

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In this document, you will see an extensive "memory jogger" series of words, occupations, etc., that will help you remember people you know. It is useful to begin quickly writing down those individuals who immediately come to mind as Candidates for your business.

### CLIENT CANDIDATES

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Understandably, if you've gotten to a healthy weight and others have noticed, you may have people already asking you about your transformation. Those folks are definitely Candidates for our Healthy Body programs and many of these people may also be Candidates for the Full Trilogy. The truth is, nearly everyone is a Candidate for our products. Whether to lose weight, create better health, or for just all-around good nutrition, our products and programs literally offer something for everyone!



## CLIENT CANDIDATES THAT QUICKLY COME TO MIND – WHO DO YOU KNOW FROM THESE CATEGORIES?

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• Needs to lose 20 lbs or less	• Has a wedding coming up
• Needs to lose 20 to 50 lbs	• Has a class reunion coming up
• Needs to lose 50 lbs or more	• Has arthritis or other joint problems
• Takes blood pressure medication	• Is an athlete
• Takes cholesterol medication	• Going on a vacation
• Type II diabetic	• Friends, relatives, or neighbors
• Borderline diabetic	• People from my clubs, church, or social contacts
• Overweight child/children	• Co-worker, past and present
• Perpetual dieter	

## TRILOGY AND BUSINESS CANDIDATES

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When you consider people to sponsor, your goal should be to look for the very best people you know and with whom you would like to be in business. Keep in mind that you are offering this opportunity to someone, and that they have the most to gain by becoming involved. You are paying them a compliment by thinking of them.

The **OPTAVIA** opportunity is broad and open to many people from many different backgrounds. It isn't limited to a particular age, gender, education level, or skill. Consider people who have a positive outlook, who are focused, ambitious, well-liked, and who are on your attitude and ambition level. Some people on your list you'll know well; others will just be acquaintances.

*The important thing is to get them on your list.*

## DON'T PREJUDGE ANYONE, BUT QUALIFY EVERYONE

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Do not prejudge people based on age, education level, or their current level of success. You cannot determine whether someone will be interested in this business unless you approach them. However, you should qualify everyone based on their character level. Ask yourself if these individuals are the type of people you want to work with and/or be in business together? Can you trust them? Do you like their attitude and personality?



## BUSINESS CANDIDATES THAT QUICKLY COME TO MIND – WHO DO YOU KNOW WITH THESE QUALITIES?

• A leader	• Trustworthy
• Sharpest person you know	• Most ambitious person you know
• Friendliest	• A great encourager
• Most helpful	• Wants to get ahead in life
• Most caring/nicest	• Hates their job/profession
• Most successful	• Works too many hours
• Best friend	• Is hurting financially
• A great counselor	• Needs a vacation
• A great example	• Wants to put child/children in private school
• Likes working with people	• Needs to put child/children through college
• Is a family man/woman	• A dreamer
• Likes to travel	• Influential

## HOW MANY PEOPLE DO YOU KNOW?

According to Researchers at Colombia University, the average person knows over 600 people! That’s a lot of potential for you and tremendous transformational opportunities for many of them. Be thinking about “spheres of influence”. Think about folks you know in terms of categories and who they know. Each person you know can potentially lead you to another 600 people.

## CREATING A “MASTER LIST”

Below you will find an exercise called free association. Since the average person knows somewhere around 600 people, or more, doing this exercise should produce for you a Master List of well over 100 Candidates to eventually approach about **OPTAVIA**. Again, do not worry about how to approach all of them right now; *you will learn that later*. However, take 20 to 30 minutes now to answer the questions in the exercise so that you can begin to realize just how many people to whom you share **OPTAVIA**.

### Take Your Eyes Off Yourself

Think about all of the hopes, dreams, and needs that could be reached for those who participate in **OPTAVIA**! Think of the lives you can influence, impact, and help to transform. When we share **OPTAVIA**, we share a very special gift that can change lives for the better.



# THE FREE ASSOCIATION EXERCISE

From the categories on the next page, try to think of people you know who fit any of these or similar groups. Use free association and jot down the names of people who come to mind. *Do not pre-judge or qualify people now; you can classify people later.* **The idea here is to be spontaneous and write the names of as many people as you know in a fast, free-flowing manner.**

## WHOM DO YOU KNOW FROM THE FOLLOWING RELATIONSHIPS...?

**Directories/Lists** - Your address book, your cell phone contacts, social media contacts (email, Facebook, MySpace, Twitter, LinkedIn, etc.), your wedding invitation list, holiday card list, high school or college annuals, the list of members in the clubs, groups, organizations, or religious affiliations that you are a member.

**Brainstorming Resources** - Friends, current and former neighbors, relatives, current and past fellow employees, a book of first names, the yellow pages of the phone book (occupations), and the white pages of the phone book (last names).

### Whom do you know who lives here?

• Your Street	• Kansas	• Oklahoma
• Your Neighborhood	• Kentucky	• Oregon
• Nearby cities/towns	• Louisiana	• Pennsylvania
• Cities in your state	• Maine	• Puerto Rico
• Alabama	• Maryland	• Rhode Island
• Alaska	• Massachusetts	• South Carolina
• Arizona	• Michigan	• South Dakota
• Arkansas	• Minnesota	• Tennessee
• California	• Mississippi	• Texas
• Colorado	• Missouri	• Utah
• Connecticut	• Montana	• U.S. Virgin Islands
• Delaware	• Nebraska	• Vermont
• Florida	• New Hampshire	• Virginia
• Georgia	• New Jersey	• Washington
• Guam	• New Mexico	• Washington, DC
• Hawaii	• New York	• West Virginia
• Idaho	• North Carolina	• Wisconsin
• Illinois	• North Dakota	• Wyoming
• Iowa	• Ohio	• Overseas Military Bases



**Whom do you know that either works in or is interested in the following areas?**

**Accounting or Legal:** Attorneys, paralegals, accountants, CPAs, bookkeepers, title searchers, actuaries

**Architects, surveyors, draftsmen:** Residential, commercial, landscape, swimming pool

**Athletics/sports:** Boating, sailing, water skiing, jet skiing, parasailing, swimming, surfing, off-roading, snow skiing, bowling, football, volleyball, softball, baseball, tennis, racquetball, rollerblading, golfing, fishing, hunting, skeet shooting, gymnastics, fitness centers, weightlifting, jogging, hiking, kayaking, canoeing, skydiving, scuba diving, aerobics, flying, racing, hot air ballooning

**Banking:** Loan officers, tellers, managers, credit counselors, credit unions

**Building:** Building contractors, developers, supervisors, foremen, plumbers, carpenters, carpet layers, sheetrock installers, masons, electricians, painters, remodeling contractors, roofers, general maintenance people, landscapers, concrete contractors, lawn sprinkler system engineers, asphalt contractors, sandblasters, wallpaper hangers, siding contractors

**Business owners/workers:** Entrepreneurs, retail store owners, home-based business people, real estate brokers, restaurateurs, interior designers, deli owners, gas/service stations, tire stores, body shops, lumber stores, hardware stores, moving companies, storage facilities, dry cleaners, campgrounds, plumbing stores, printers, lighting stores, security systems, water purification systems, barbershops/beauty salons, music stores, auctioneers, camera shops, specialty stores, bicycle shops, gift shops, hobby shops, shutter/blinds/shades stores, flower shops, garden shops, ice cream stores, candy stores, fitness centers, vending companies, towing companies, vitamin/herb shops, hotel/motel owners, antiques stores, pawn shops, shoe stores, swimming pool maintenance companies, furniture stores, pharmacies, farmers, ranchers, lumbermen, morticians, paint contractors, cleaners, convenience stores, real estate, clothing stores, bookstores, lawn care services, pet stores, photographers, bakeries, catering, wedding services, spa owners, pest control companies, jewelry stores, perfume stores, limousine services, self-defense schools, travel agencies, employment agencies

**Clubs/organizations:** Chamber of Commerce, Welcome Wagon, Optimist, Lions, Elks, Kiwanis, Masons, Boy or Girl Scouts, 4-H, Girls/Boys Clubs, Toast Masters, Dale Carnegie instructors/participants

**Computers and Technology:** Computer consultants, system engineers, systems analysts, programmers, Web masters, Web designers, computer sales and service people, Internet marketers, value-added resellers, computer enthusiasts

**Corporations:** CEOs, Presidents, CFOs, Executive Vice Presidents, Vice Presidents, Directors, Managers, Executives, Supervisors, Controllers, Administrative Assistants, Receptionists

**Counseling:** Social workers, marriage counselors, debt counselors, drug and alcohol abuse counselors



**Education:** Teachers (pre-school, elementary, middle, high school), librarians, teachers' aides, home schoolers, volunteers, principals, superintendents, board members, PTA, PTO, college professors, graduate or continuing education students

**Engineering:** Electrical, civil, aerospace, mechanical, design, project, structural, chemical, computer, biomedical, mining, safety, transportation

**Entertainment/news:** Reporters, journalists, publishers, announcers, actors, stage crews (lighting, camera) directors, engineers, producers, editors, screenwriters, authors, critics, theater, television, radio

**Health care:** Physicians, nurses, psychologists, psychiatrists, radiologists, anesthesiologists, dermatologists, general surgeons, heart surgeons, neurologists, brain surgeons, plastic surgeons, orthopedic surgeons, pediatricians, ob-gyns, dentists, opticians, optometrists, veterinarians, chiropractors, technicians, therapists, physical therapists, vet techs, nutritionists, pharmacists

**Hobbyists:** Gardening, antiques, photography, crafts, theater, bridge, woodworking, music, antique cars, scrapbooking, cooking, wine enthusiasts, quilters

**Investment:** Financial planners, stockbrokers, bond brokers, pensions, insurance, annuities

**Law enforcement:** Police (local, state, federal), fire, security, detective, forensic, coroner's office, intelligence officers, border patrol, INS, FBI, ATF, CIA, Homeland Security, Port Authority

**Marketing/advertising:** Designers, managers, copywriters, Web designers, graphic designers, video and audio production, Internet marketers, typesetting, sign makers

**Military:** Officers, enlisted men, Reserves, National Guard, Army, Navy, Marines, Air Force, Coast Guard, veterans, Iraq War, Afghanistan War, Gulf War

**Municipal:** City government, sanitation, county extension service, public health

**Music/arts:** Enthusiasts, teachers, students, musicians, artists, dancers, actors, craftsman, hobby makers

**Religious:** Church, pastors, deacons, leaders, Sunday school teachers, synagogue, rabbis, other houses of worship

**Sales:** Corporate, commercial, industrial, insurance, pharmaceutical, advertising, automobile/truck, used cars, cell phones/beepers, boats, motor homes, bicycles, rental agencies, hearing aids, health equipment, electronics, appliances, other retail, residential real estate, commercial real estate, resort/ time-share, telemarketing, travel agent

**Scientists:** Physicists, chemists, research scientists, mathematicians, theorists

**Services:** Public health, job placement, ambulance, phone, exterminating, pool, lawn, taxi, bus, limousine, railroad, tollbooth, heating, postal, mortician, UPS, Federal Express, beauticians, hairdressers, barbers



**Social services:** Day care services, nursing home, counselors, rehabilitation councilors, occupational therapists, grief counselors

**Transportation:** Pilots, flight attendants, airport employees, truck drivers, delivery drivers (UPS, FedEx), bus drivers, cab drivers, railroad employees, moving vans, helicopter pilots

**Vocational/trades:** Repair services, watch repair, receptionists, client services, clerks, personal assistants, chauffeurs, secretaries, telephone operators, security personnel, seamstresses, custodians, supervisors, auto mechanics, appliance repair people, general maintenance, landscapers, lawn maintenance, babysitters, satellite installation, furniture restoration, vacuum cleaner repair, transmission specialists

**Volunteers:** Cancer drive, Easter Seals, Heart Association, mission work, school, church, parade volunteers





# 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 a bigger life!

NAME	PHONE #	EMAIL	CONTACT DATE	NOTES

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





## GETTING INTO ACTION

### Create Two “Top 20” Lists

**If you are a new Coach...**

Once you have developed your Master List, it is time to begin sharing **OPTAVIA** with your Candidates. To get started, create two short lists of about 20 names each...one list for people you will either share the Full Trilogy or the Health Transformation Program and one list for Business/Entrepreneur Candidates. In the beginning these lists will most likely come from your close friends, relatives and acquaintances. These are the list you will use to launch your business.

Once you write the lists, ask your Business Coach or someone else on your Mentorship Team to help you get started sharing the exciting story of **OPTAVIA** with them. A good goal is to expose 20 prospects in your first week to really get some momentum going!

**If you are a Senior Coach or Higher...**

Your Top 20 Candidates for both the program and business will go on your MAP to be reviewed with your Business Coach Monthly

### MY “TOP 20” CLIENT/TRILOGY CANDIDATES

	NAME	PHONE #	EMAIL
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3.			
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20.			



## MY "TOP 20" BUSINESS PROSPECTS

	NAME	PHONE #	EMAIL
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