



WELCOME

Working with Clients the OPTAVIA way.

The **OPTAVIA** Success System is a tool to help you organize your business around helping Candidates progress to Clients. By keeping track of all your Candidates and Clients, you'll be able to make sure you give each of them the encouragement and inspiration they need at just the right time. And that's the best way to grow your own Coaching business.

What's in your OPTAVIA Success System?

Introduction	Health Assessment	Success System: Section 1	Success System: Section 2	Success System: Section 3
Instructions on how to set up and start using your OPTAVIA Success System	Blank Health Assessment provided for you to fill in	Candidate Follow-Up Help your Candidates become your Clients	New Clients Help your new Clients develop healthy habits	Active Clients Help your active Clients Live a Bigger Life

Setting up your OPTAVIA Success System

The system is designed to be flexible and work the way you work best, whether that's with paper or digital files. It won't take you long to get everything ready and then you'll be up and running! Use this convenient binder to track your Clients and Candidates!

If you're using the **OPTAVIA** Success System binder:

- ① Use the three section folders as dividers.
- ② Keep your Contact List, blank Health Assessments and Health Assessment Guidelines in front of Section 1 (Candidate Follow-Up) for quick reference.
- ③ Move your Health Assessments from one section to the next as you help each person progress.

If you would prefer to set up a digital Success System:

- ① **Start your digital system:** Create a new Master file folder called: '**OPTAVIA** Success System' Within your Master folder create 3 new folders: 'Candidate Follow-Up', 'New Clients' & 'Active Clients'.
- ② **Download:** Success System Instructions, Contact List, Health Assessment and Health Assessment Guidelines & Considerations (Save template files into your Master folder from '**OPTAVIA** LEARN').
- ③ **For each Candidate:** Create a new folder with their name in the 'Candidate Follow-Up' folder. Fill out the digital trackers and save copies within the Candidate's personal folder.
- ④ **As Candidates become Clients:** Move their Candidate folders into your 'New or Active Client' folders.

Reminder: Back up all your files regularly!

CANDIDATE FOLLOW-UPS

Help your Candidates become your Clients

Remember every one of your Clients started as a Candidate; some people just need a little longer to make their mind up than others. That's why your Candidate Follow-Up file is so important. Use it to keep track of everyone you've spoken to and make sure you stay in touch with all of them.

Check in from time to time and see how they're feeling and remind them of your transformation story and experience. Listen carefully to their questions and help them progress.

Every Candidate is one more opportunity for you to be the inspiration that gets someone started on their own path to lifelong transformation.

What to keep in this section:

- Your follow-up list.
- All forms for Candidates who need additional follow-up.

Top tips for success:

1

Make sure you've added them to **OPTAVIA SHARE**.

2

Put their **Health Assessment and/or Wellbeing Evaluation** into **Section 1 - Candidate Follow-Up**.

3

Stay connected and speak to your Candidates periodically to check their interest.

4

Once they're ready to get started put their files into **Section 2 - New Clients**.



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NEW CLIENTS

Help your new Clients develop healthy habits

Study after study¹ shows that support and guidance increase chances for success in achieving a healthy weight. That's why you and the thousands of other **OPTAVIA** Coaches™ are so important.

As your new Clients begin to discover our Fuelings and healthy habits for the first time, make sure you're with them at each step. They'll have questions and you're the best person to help them along the way and steer them to success because you've likely been in their same shoes.

And remember to celebrate all the little victories with each new Client that will, over time, add up to the big ones. Inspire them to stay on their journey to Lifelong Transformation, One Healthy Habit At A Time™.

What to keep in this section:

- All forms for Clients who are in the first month of their **OPTAVIA** journey.

Top tips for success:

1

Continue to fill out a Health Assessment and attach it to their Wellbeing Evaluation (if completed). Put the form in this section and organize by your next scheduled contact with them.

2

Make sure you keep in regular contact, take a look at 'How to Get a New Client Started' and 'Supporting your New Clients' for more detailed information.

- Help them select a program and place their first order as a member of **OPTAVIA** Premier.
- Send them a welcome email, and ask them to take a good "before" photo.
- Ask them to subscribe to your newsletter and online support group (if using).
- Speak to them the night before they start to give them inspiration, and outline the information on the Journey Kick-off card that they received in their first order.
- Speak to them on Days 1 thru 4 of their program, and on day 7.
- Speak to them twice in Week 2, 3, and 4 then move to a weekly Check-in.
- Remind them of great support available via our **OPTAVIA** Community.

3

During your Client Check-ins, refer to their Health Assessment and/or Wellbeing Evaluation and keep a note of progress. Take a look at "Client Check-in" for detailed information on support.

4

Once your Client has been on their **OPTAVIA journey for one month, move them to Section 3 - Active Clients.**



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¹ Appel, L.J., et al., Comparative effectiveness of weight-loss interventions in clinical practice. N Engl J Med, 2011. 365(21): P. 1959-68.

ACTIVE CLIENTS

Help your Active Clients Live a Bigger Life

As you help your Active Clients achieve and maintain their optimal weight they'll see the benefit as they increase their health, confidence and vitality. They'll also see how a healthy weight is the catalyst for bigger changes.

And you'll see the benefit as they become enthusiastic advocates for your business. Always make sure you thank everyone who recommends you as an **OPTAVIA Coach™** to someone else or suggest they pay it forward and coach their family and friends themselves!

What to keep in this section:

- Forms for Clients who have been on their **OPTAVIA** journey for more than one month and are an active client.

Top tips for success:

1

Keep your Client's motivation levels up by recording their progress on the Health Assessment during your weekly Client check-ins so you can share and help them see their little - and big - victories.

2

Make it even easier for your Client to enjoy their healthy decisions by showing them how to personalize their own **OPTAVIA Premier** order.

3

As your Client becomes inspired by their own success, ask them if there's anyone else they'd like you to talk to about their transformation with **OPTAVIA** or if they are interested in paying it forward themselves. Always follow-up on these referrals, they're a great way to grow your business.



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OPTAVIA® HEALTH ASSESSMENT

NAME _____ PHONE NUMBER _____

EMAIL _____

INTRODUCTIONS AND SETTING EXPECTATIONS FOR THE APPOINTMENT:

"It's great speaking with you today and I'm excited that you are interested in learning more about **OPTAVIA**. Before we can determine if one of our programs is right for you, I'd like to ask you a few questions to learn more about you and your health goals."

1 AWAKEN

Can you share with me why you wanted to connect with me today? I would love to hear what you would like to accomplish with your health. (Weight loss, create healthier habits, etc.)

How would you describe your current state of health?

How much weight would you like to lose? _____
(If not answered in the question above)

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

What would it mean to you to be at that healthy weight/healthy place again (feel, activities, relationships, etc.)?

What is your main motivation for wanting to make changes to your health?

Share your story (or someone else's) -

"Now that I've heard a little about your current situation and some of your goals, I want to give you a quick idea of what is possible."

Take 90 seconds or less to share the pieces of your story (or someone you have Coached or know about) that will connect with this person.

2 DAILY ROUTINE/HABITS

"Let's continue with a few more questions to make sure I have a good overall picture of your daily habits."

"Research shows that there are 6 significant factors that contribute to overall physical health. I'd briefly like to explore those with you."

SLEEP

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

What time do you typically go to bed? _____ Wake up? _____

How would you describe the quantity and quality of your sleep?

Do you feel rested? _____

HYDRATION

How much water would you say you drink in a day? _____

Do you consume other beverages? If so, how much and how often per week? Coffee _____ Soda _____ Tea _____ Alcohol _____

MOTION

On a scale of 1 to 10, how would you rate your energy level? _____

What kind of physical activity do you engage in? _____

How many days a week do you exercise? _____

How would you describe the quality and quantity of the exercise you do each week? _____

STRESS

On a scale of 1 to 10, how would you describe your stress level? _____

What do you do for work? _____

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

Can you identify any other stressors in your life?

EATING HABITS

How many meals per day do you eat? _____

When do you eat your first meal? _____ Last meal? _____

Do you snack between meals? _____

If so, what kind of snacks do you eat? _____

Can you identify any unhealthy patterns in your eating habits?

How many times a week/month do you eat out? _____

Where and how often? _____

WEIGHT (may have already been answered in the "Awaken" section)

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 about losing/maintaining weight?

If not ready yet, use this area to track follow-up			

"I appreciate you may need to think about this a little bit. May I continue to follow up and see how your health journey is going?"

3 HEALTH CONSIDERATIONS

"Now I'd like to ask you a few quick questions about any health considerations. (The reason I ask is that certain allergies or medical conditions could influence which **OPTAVIA** program you should be on and which **Fuelings** to choose.)"

Specifically: High Blood Pressure Diabetes I Diabetes II Allergies Gluten Soy Other _____

Are you: Pregnant Nursing

Are you on any medications that you think I should know about (for example: Diabetes, High Blood Pressure, Lithium, Thyroid, Coumadin, or others that could affect your **OPTAVIA** plan). _____

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

Lastly, is there anyone in your life that you would like to get healthy with you?_____

"Ok, now that I know a little bit about you and your health goals, I'd like to share with you how our program could help you achieve what you're looking for."

Explain our Offer/Program - Use the [Health Assessment Guideline](#) document to explain the best program for them.

NAME:	PHONE #:	PREFERRED METHOD OF CONTACT:	PHONE	EMAIL
OPTAVIA ID#:			TEXT	MESSAGE
ADDRESS:				
CITY/STATE/ZIP:				

HOW DID WE MEET?	PERSONAL CONTACT	OTHER	LEAD	REFERRAL: _____
GENDER:	AGE:	HEIGHT:	CURRENT WEIGHT:	BMI:
DESIRED WEIGHT:	BMI:	PROFILE DATE:	ORDER DATE:	ARRIVE DATE:
START DATE:				

SUGGESTED CLIENT CONTACT THEIR HEALTHCARE PROVIDER	UPDATING OPTAVIA PREMIER ORDER VIDEO SENT	PROGRAM ORDERED:	5 & 1	4 & 2 & 1
READING OF OPTAVIA GUIDE EMPHASIZED	CONFIRMATION CLIENT UNDERSTANDS OPTAVIA PREMIER ORDERING		3 & 3	OTHER
SUGGESTED "BEFORE PICTURE" AND MEASUREMENTS	OPTAVIA COMMUNITY SUPPORT EXPLAINED	THEIR REASONS FOR GOING ON THIS JOURNEY (THEIR WHY):		
SUGGESTED OPTING INTO OPTAVIA30™ TEXT CAMPAIGN	WEDNESDAY NIGHT SUPPORT CALLS/ZOOMS			
WELCOME EMAIL SENT	OPTAVIA ANSWERS			
ADD TO NEWSLETTER	INTRODUCED TO SUPPORT TEAM COACH			
SENT JOURNEY KICK-OFF VIDEO AND DID KICK-OFF CALL	SOCIAL MEDIA COMMUNICATION AND SUPPORT EXPLAINED			
REFERRAL PACKET SENT	FRIEND REQUEST ON FACEBOOK			
	ADDED AND WELCOMED TO FACEBOOK SUPPORT GROUP			

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

Remember to continue to check in with your Client from Day 7 onward. Please use the following pages to continue your check-ins.

CHECK-INS CONTINUED:

	DATE	NOTES
DAY SEVEN CHECK-IN		
WEEK 2 CHECK-IN		
CHECK-IN		
WEEK 3 CHECK-IN		
CHECK-IN		
WEEK 4 CHECK-IN		
CHECK-IN		

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."

WEEKLY CHECK-INS:

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



GETTING STARTED WITH YOUR OPTAVIA SUCCESS SYSTEM

Once you have your files set up it's time to connect with Candidates and help them start their journey to lifelong transformation. It's an exciting time as you start to see the possibilities open up for you.

Your Client Acquisition Bonus is within your reach!

Remember, your \$100 Client Acquisition Bonus (CAB) is waiting for you, and it's only available in your first 30 days as a Coach. Try to earn your CAB within your first 2 weeks as an **OPTAVIA Coach™**.

Your Business Coach is here to help you!

① Work on your Contact List, discuss with your Business Coach and identify your **Top 10 Candidates**.

② Decide what you're going to say and reach out to your **Top 10 Candidates** to share your **OPTAVIA** transformation story and what it could mean for them.

See how they respond.

- ③
- If they're a 'yes' welcome them as a new Client!
 - If they're a 'maybe' they stay a Candidate for follow-up and stay on your Follow-Up list.
 - If they're a 'not now', thank them and see if they can refer anyone who may be interested.

Making progress with your OPTAVIA Success System

Once you've started to make contact with your Candidates and you've got your first new Clients, you're up and running! Staying successful and growing a bigger business is all about staying in contact with people and helping them progress:

For Your Candidate Follow-Ups:

① Make sure to welcome them using **OPTAVIA SHARE**.

② Put their Health Assessment in Section 1 - 'Candidate Follow-Up'.

③ Stay connected and speak to your Candidates periodically to check their interest.

④ Once they're ready to get started put their files into Section 2 - 'New Clients'.

For your New Clients:

① Work with all your New Clients as soon as possible to fill out a Health Assessment and put it in Section 2 - 'New Clients' folder.

② Make sure you have weekly check-ins with your New Clients, discuss their Assessment with them and make a note of their progress.

③ Once a Client has been on their program for one month, move them to Section 3 - 'Active Clients'.

SHARE

At **OPTAVIA**, we want you to live the healthiest life possible. Our programs are simple and easy to follow and, if followed correctly, lead to lifelong transformation. The secret to our successful track record is that along with a structured eating plan and support, we incorporate Healthy Habits in everything our clients do.

There are four components that will make up the foundation of your success. They are:

1. **Your Coach:**

One-on-one personal support is what sets our program apart from other lifestyle programs available. I'll be there to guide you on this journey and help you develop healthy new habits and make healthy choices that lead to lifelong transformation. Study after study shows that support and guidance increase your chance for success in reaching your optimal weight.* I'll help keep you accountable and we'll celebrate your successes along the way... the little ones and the big ones!

2. **The Habits of Health System:**

Developed by co-founder, Dr. Wayne Andersen, the Habits of Health system is an innovative lifestyle approach that contains everything you need to replace unhealthy habits with healthier ones. Adopting these habits contributes to your long-term success.

With the Habits of Health system, you'll be learning new Healthy Habits in bite sized pieces... and these powerful habits support you in creating the healthy life you want.

3. **Our OPTAVIA Community:**

In addition to your **OPTAVIA Coach™**, you'll have access to support from our **OPTAVIA Community** of like-minded people who are all focused on creating better health. From live and recorded video conferences and support calls, to Nutrition Support, to client focused support groups, to online support and more, our Community is an important asset to your success.

4. **Our OPTAVIA Fuelings:**

All **OPTAVIA Fuelings** are nutritionally interchangeable and five of them a day provide 100% of 24 vitamins and minerals along with probiotics to support digestive health.

With the Optimal Weight 5 & 1 Plan®, your body enters a gentle but efficient fat-burning state, which is essential for helping you lose weight.

You'll enjoy six small meals a day spaced every 2 to 3 hours apart. Five of your meals are delicious, scientifically-designed **OPTAVIA Fuelings** and the sixth meal consists of a meal you prepare yourself that we call your "lean & green" meal. It's a healthy amount of lean protein and 3 servings of non-starchy vegetables.

You'll also want to drink 64 oz. of water a day.

It's a proven system and it's easy to follow.

INFORMATION REGARDING PRICE OF PROGRAM

(you might have already interjected this information during your presentation)

The best part of our plan is that it's so affordable. The typical American spends about \$15-20 per day on food. This includes fast food, sit down restaurants, groceries you purchase, snacks, cafeteria, vending machines, coffee runs, etc. How much do you believe you spend per day on food?

Many clients find they are saving money or breaking even compared to what they already spend on food so for them, it's cost neutral!

* Appel, L.J., et al., Comparative effectiveness of weight-loss interventions in clinical practice. N Engl J Med, 2011. 365(21): p. 1959-68.

INVITE

REMEMBER - if a Client answered affirmatively to any of the questions in the “Health Conditions” Section 3 of the Health Assessment Guideline, be sure to consult the OPTAVIA Program Considerations found on page 3 [here](#).

From listening to what you shared with me I feel that this is a perfect fit for you and your lifestyle. I am excited for you to get started. I believe you'll love everything about this program as you experience it!

Do you have any other questions I can answer or do you feel like this is a fit for what you are looking for?

IF THEY ARE READY TO MOVE THEIR HEALTH FORWARD:

Great! Let's get you started!
Let's decide which Program Kit is right for you.

Let me guide you for placing your first order, I'll just need to verify your contact information.

Your program will arrive in about 1 week. You'll be receiving a welcome email and I will add you to a great Facebook support page.

Your transformation towards achieving your health goals could happen quickly and when it does, people will be asking you about it. 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. You may not be thinking about this right now, but who knows... you may feel so incredible with the results you get that you may want to share OPTAVIA with others. A significant percentage of our Coaches were first Clients who got healthy and then decided to “pay it forward.”

Please call or text as soon as you receive your comprehensive program. Also, many of our clients love the support they receive when they participate and interact with our community. You can participate in support calls, social media, and trainings.

Processing your Client:

- After you complete your meeting/phone/zoom, add any additional notes that you think are important to the [Health Assessment](#).
- Make sure you assist them in placing their program order.
- Send them a welcome email.
- Add them to your contacts in your phone.
- Friend request them on Facebook, and add them to - and introduce them on - your Client support page.
- Put their [Health Assessment](#) in the Success System Client folder.
- Confirm what day they're starting and set up a Journey kick-off phone call with them.
- Coach them along their Optimal Health™ Journey.

WHAT YOU WILL RECEIVE WITH YOUR PROGRAM

When you enroll in our program you will receive my support and coaching, an OPTAVIA Guide that helps you start your journey.

(NOTE: you can mention they will receive “your Habits of Health System” if they are ordering a kit that contains the Habits of Health books) and 30 days of the most popular Fuelings.

We'll also give you the option to enroll into the OPTAVIA Premier. When you enroll, you'll receive 5 free boxes of Fuelings, save money on shipping, and you'll get up to 10% reward credit on your account for your future program orders each time you have a qualifying order*. The best part is that it also ensures you have the Fuelings you need each month on program.

*Terms and Conditions apply to OPTAVIA Premier orders.

IF NOT YET:

“I appreciate that you may need to think about this a little bit. May I continue to follow up and see how your health journey is going?”

Possibly set up a follow up appointment.

Also ask, “if you run across anyone in your world who also is looking to (get healthier, have great energy, lose weight, be more active, etc.) would you mind connecting us if appropriate?”

Follow-up structure:

- Send a thank you text, assuring them that you would love to partner with them to “insert their why.”
- If you put your candidates in your Facebook client support page, ask them if you can add them to this page.
- Put them in your follow folder and follow up on your follow-up day.

OPTAVIA PROGRAM CONSIDERATIONS

It's important for you to understand that there are multiple aspects of one's health to consider when selecting which **OPTAVIA** program fits best for a client. Some of these can be allergies, medication interactions, or general health conditions. Please see below to help guide you in coaching your new client towards their Optimal Health™ and Wellbeing journey.



Diabetes Plan:
While the Optimal Weight 5 & 1 Plan®, Optimal Weight 4 & 2 & 1 Plan™, and Optimal Weight 5 & 2 & 2™ Plan are all appropriate for people with diabetes, it is essential that the individual's healthcare provider monitors blood sugar and medication dosages. Continued medical monitoring by the healthcare provider will be necessary.

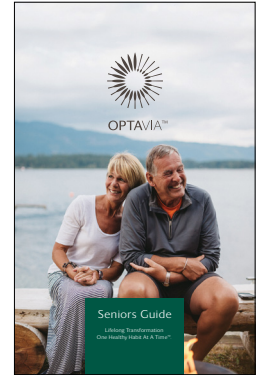
Keywords : Type I, Type II, Insulin, Oral Medications or an injectable



Gout Plan:
Our **OPTAVIA** for Gout Plan promotes gradual weight loss and encourages food choices with only low or moderate amounts of purines.



Nursing Mothers Plan:
Our **OPTAVIA** for Nursing Mothers Plan is designed for the nursing mother whose baby is over two months of age and who is providing the majority of the baby's nutrition through breast milk.



Seniors Guide:
People age 65 and older can use the Optimal Weight 5 & 1 Plan with 30 minutes of physical activity every day. A higher calorie meal plan may be recommended based on individual needs.

Thyroid Medications, Soy, & OPTAVIA™

Soy Allergy

Thyroid Medication

Examples of soy protein-free findings:

- OPTAVIA™ Green Smoothie, Chocolate Smoothie
- OPTAVIA™ Green Smoothie, Coffee, Lemon, Lime, Orange
- OPTAVIA™ Green Smoothie, and Optavia Protein Bar & Chews
- OPTAVIA™ Green Smoothie, Green Smoothie, Apple, Banana
- OPTAVIA™ Green Smoothie, Green Smoothie, Cherry and Lemon, Banana, Dates
- OPTAVIA™ Green Smoothie, Green Smoothie, Apple, Banana

For a complete list of products from OPTAVIA™ that contain soy protein, please visit www.OPTAVIA.com.

Thyroid Medications, Soy and OPTAVIA
Medications Include: Synthroid, Levothyroxin



Teen Plans:
Our **OPTAVIA** for Teens Plans are specially designed to meet the nutritional needs of adolescent boys and girls, 13-17 years old. Do not use the **OPTAVIA** program if you are under the age of 13 years old. For more information, refer to the [OPTAVIA for Teen Girls Guide](#) or the [OPTAVIA for Teen Boys Guide](#).



Plan Overview:
See all plan overviews in one location.

Medical Conditions

We recommend that you contact your healthcare provider before starting and throughout your **OPTAVIA** weight loss journey, especially if you are taking medications (e.g., diabetes medications, high blood pressure medications, Coumadin® (warfarin), lithium, thyroid medications, etc.).

Do not use the **OPTAVIA** Program if you are pregnant or under the age of 13. If you have a serious acute or chronic illness (e.g., heart attack, diabetes, cancer, liver disease, kidney disease, anorexia, bulimia, etc.) do not use the **OPTAVIA** Program until your healthcare provider says you have recovered or stabilized. The Optimal Weight 5 & 1 Plan is NOT appropriate for teens (13 to 17 years of age), sedentary older adults (65 years and older), nursing mothers, people with gout, some people with diabetes, and those who exercise more than 45 minutes per day. For special medical or dietary needs, refer to our program guides online and talk to your **OPTAVIA** Coach™.

NOTE: Rapid weight loss may cause gallstones or gallbladder disease for those at high risk. While adjusting to intake of a lower-calorie level and diet changes, some people may experience lightheadedness, dizziness or gastrointestinal disturbances. These usually are temporary. This Program and any of its materials do not in any way constitute medical advice or substitute for medical treatment.

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 levels of certain medication.

Further questions or concerns:

Contact us at 1.888.OPTAVIA and select Nutrition Support
Or visit: **COACHANSWERS.OPTAVIA.COM**