

## NEW COACH CHECKLIST

### SOCIAL MEDIA LAUNCH

- Write your Launch Post and schedule the launch time with your Sponsoring Coach.  
PRO TIPS: Post should show side-by-side transformation, include the disclaimer, make head size the same in each, don't use the word OPTAVIA

### SET UP MENTORSHIP THREAD WITH NEW COACH, SPONSORING COACH, FIBC AND/OR GLOBAL

- Global should be included if no FIBC is present

### WORK YOUR POST AND START 3-WAY MESSAGES WITH POTENTIAL CLIENTS

ALWAYS include your mentoring coach and follow the script to set up the message.

### SET UP HEALTH ASSESSMENTS WITH YOUR MENTORING COACH

Your mentors will lead for the first 5-8 Potential client calls, and you will listen and learn

### WHEN SOMEONE SAYS YES TO PROGRAM, GET THIS INFORMATION:

- Shipping address
- Email
- Form of payment
- Allergies/intolerances
- Do they take thyroid medicine, Coumadin, have Afib or gout. Ask about GLP-1

**DO NOT send a preference sheet. Let the client know you will take this off their plate and will enter their order with a mix of "crowd favorites." Enter the order within 12 hours of getting payment information.**

**[HOW TO ENTER A CLIENT ORDER](#)**

**AFTER THE ORDER IS PLACED SHOW YOUR COACH HOW TO ACCESS [CREATING EMPOWERED CLIENTS](#)**

**GUIDE THEM THROUGH THE STEPS TO LAUNCH AND COACH THEIR FIRST CLIENT**

- Add to Client Page on Facebook
- Send the [WELCOME & 9 TIPS](#) and the [CLIENT LINKTREE](#)
- Send the [KICKOFF CALL](#) and [5&1 TRACKER](#) and set up a 15-20 minute call to go over the client's personal Week 1 journey

Clients should always start on a Monday so they will be fully in fat burn before the weekend. We run a Team Kickoff Call on Sundays at 5pm. You must be on any Kickoff Call you have clients on, but this saves you time and ensures they get the importance of the MENTAL part of this program.

CLIENT JOURNEY KICKOFF CALL

ZOOM ID 336 558 7242

Passcode: OPTAVIA

SUNDAY

5 pm EST/4 PM CST/3 PM MST/ 2 PM PST

**CLIENT SUPPORT WEEK ONE**

- Day Before Kickoff:** Confirm your call time to review their program
- Send [DAY BEFORE YOUR METABOLIC RESET TEXT](#)

### **CLIENT SUPPORT DAYS 1-8**

- SEND [DAILY TEXT MESSAGES](#) AND SCHEDULE 5 MINUTE CHECK IN CALL USING THE [DAY 1-4 CHECK IN QUESTIONS](#)
  - DAY 1
  - DAY 2
  - DAY 3
  - DAY 4
  - DAY 8
- SCHEDULE WEEK ON CELEBRATION CALL WITH YOUR MENTORSHIP TEAM
- WEEKS 2 & 3 10 MINUTE CHECK IN CALL
- WEEK 4 “GRADUATE” CLIENTS TO VIP CALLS AND CELEBRATE THEM UNLOCKING ANOTHER LEVEL OF THEIR JOURNEY