

I + Q=A (Coach Candidate Evaluation)

First Name: _____ Last Name: _____ Date : _____

On average, 1 in 5 of your clients will become a health coach. Sort your candidates to see who you want on your team, then play detective and find out how coaching would serve them. Layer coaching, ask questions & get to know them on every call.

Did Client post their milestone post/stories Wk 1_____ Wk 2_____ Wk 3_____ WK 4_____

CCC (Client Celebration call) #1 date _____ with who _____ notes _____

CCC (Client Celebration call) #2 date _____ with who _____ notes _____

Identifying

On a scale of 1-4, **1 being the highest**, please rate your Candidate in the following areas:

____ Moving forward in their health ____ Coachable ____ Excited about Their Journey

____ Where is their level of Integration ____ Looking for More ____ Successful in other areas

____ Open to learning more ____ Attractive Personality ____ Sharing/Referring Family & Friends

____ Circle of Influence

How many 1 ____ 2 ____ 3 ____ 4 ____

If there are more 1's and 2's than 3's and 4's, then move on to Qualifying

Qualifying

Their "Why." Everyone is looking for something. What do you think this Client's needs/wants are?

Income: Debt/Retirement/Private school-college/student loans/Bring parent home/less jobs/travel

Meaning/Purpose: Helping others/time freedom/community service/doing something you love

Accountability: long term health/community

How would coaching enhance their life?

Approaching

Remember the approach is simply an invite to explore.

"are you open to exploring what coaching might look like for you & your family?"

Invited to see if they were open to explore if health coaching would be a match. Date _____

Date_____ Date _____ Date _____ Yes to Explore Date _____

Presenting

What would be the best way to “Explore” coaching with this candidate?

- _____ Schedule Explore call/zoom within 48 hours with a qualified member of your support team\
- _____ Share Stories of Transformation Webinar/encourage to watch before the explore zoom
- _____ Startup or follow up based on conversation

Following Up

Set follow-up based on conversation. Next F/U call/zoom_____

Starting Up

- _____ Candidate joins us send – video to order kit and move to Meet and Greet and get started.