

Habit Finder Health Assessment Process

(For coaches only. Please do not share this with your clients/potential clients. Also please do not share this document outside your personal coaching team)

Watch this video first from Dave Blanchard: [Link](#)

Watch this training on Pro Tips from 5/25/24: [LINK](#)

Support for any habit finder glitches: support@habitfinder.com

Step 1: Take the Habit Finder Health Assessment yourself (You will want to read the instructions step by step for your assessment) using the link your coach provided you.

If you did not receive a link for your coach or your coach is not active, reach out to your Global Director or email Claire Stowell at wellness.claire@gmail.com

Step 2: Create your personal coach link.

You will want to read the instructions step by step for your coach link. Click here for instructions to get your personal link: [LINK](#)

(once you create your personal link, copy it and save to the notes in your phone)

****We suggest NOT sharing your coach link with anyone until you've complete the Debrief and Week 1 of the coaching series*****

Step 3: Register and Attend Debrief zoom the Tuesday after you take HFH Assessment (these will be recorded if you cannot attend live)

Registering for a Debrief: A person can register by going to the end of their assessment results and clicking on the button, "What's Next." You can also give them the direct link. The system knows who they are and that you are their coach and will send you an email when they are registered.

Link: [Habitfinderhealth.com/debrief](https://habitfinderhealth.com/debrief)

Debrief zooms will be every Tuesday 5pm PST/8pm EST

Zoom ID: 820 4998 5112

Password: Habits

Click here to download graphic: [LINK](#)

Step 4: Register and Attend week 1 Habit Finder Health class live and calendar the next 3 weeks for your class (these will be recorded if you can not attend live. The recording is good for 1 week).

Registering for the FREE coaching classes: A participant must be an active client of Optavia to attend. During the debrief, Dave will encourage prospective clients to meet with you to do a health assessment. Coaches, current clients, and prospective clients when they become clients, are eligible to attend.

Link: [Habitfinderhealth.com/group](https://habitfinderhealth.com/group)

Class schedule will vary depending on week

Zoom link depends on class - see graphic and class schedule below for details

Password: Habits

Click here for current HFH class schedule: [LINK](#)

Click here to download graphic: [LINK](#)

Step 5: Begin inviting by sharing your Personal Coach Link to HFH Assessment with your clients and potential clients.

****PLEASE NOTE: Your personal coach link and this assessment are NOT to be shared on social media due to licensing restrictions****

Tracking Document (this can be downloaded to excel or printed - there are 3 different tabs - active clients, inactive clients and potential clients): [LINK](#)

PRO Tip: Add your clients/potential clients to the tracking document and follow the steps in the tracking document to make sure they get scheduled for their debrief and coaching classes (classes are for optavia clients only)

Language to invite clients to take the assessment: [LINK](#)

Language to invite potential clients to take the assessment: [LINK](#)

***** When they have taken the assessment & scheduled their debrief:**

✓ You will receive an email when your client/potential client has completed their HFH Assessment and when they schedule their debrief.

✓ Your client will receive an email & a text when they complete their HFH Assessment and when they schedule their debrief. (these will be recorded and available for 1 week if they cannot attend live. Your potential client/client will receive an email with the recording in it if they are registered).

PRO TIP: Use the tracking sheet above to track where they are and what next steps are in the process for them.

Step 6: Once they completed their debrief...

Clients

The 4 week Habit Finder Health Coaching course will be massively valuable. Please remember that this course is only open to Optavia clients. This is on the honor system, please help us maintain integrity.

Active clients: Invite them to attend week 1 Habit finder Health class live and make sure they add all 4 classes to their calendar (these will be recorded and available for 1 week if they cannot attend live. Your client will receive an email with the recording in it if they are registered). **You will need to text/email the link directly to your clients, here is the link to send:** [Habitfinderhealth.com/group](https://habitfinderhealth.com/group)

Inactive clients: Reach back out and follow up after the debrief. Invite to a call to restart their journey (if it's been a while - do a new HA). Invite them to attend week 1 Habit finder Health class live and make sure they add all 4 classes to their calendar (these will be recorded and available for 1 week if they can not attend live. Your client will receive an email with the recording in it if they are registered). **You will need to text/email the link directly to your clients, here is the link to send:** [Habitfinderhealth.com/group](https://habitfinderhealth.com/group)

Potential Clients

***** these folks do NOT go into the HFH 4 week coaching class unless they become a client**

Potential clients - HA completed: Invite to a call to revisit why and goals - see if they are ready to start their health journey

If ready - place their order and Invite them to attend week 1 Habit finder Health class live and calendar the next 3 weeks for their class (these will be recorded if you can not attend live).

If not ready - continue to follow up

Potential clients - HA not completed: Invite to a health assessment to and see if they are ready to start their health journey

If ready - place their order and Invite them to attend week 1 Habit finder Health class live and calendar the next 3 weeks for their class (these will be recorded if you can not attend live).

If not ready - continue to follow up

Step 8: As you are doing your weekly coaching calls with your clients, be sure to ask their takeaways and what they are learning in their class along with the lifebook.

PRO Tip: Remind your clients that they can repeat the 4 week coaching class as many times as they li