

## **The Take Shape for Life Client Enrollment Checklist**

There are two primary scenarios for helping clients get started on the TSFL Program:

1. During a pre-session visit (your clients)
2. After a weekly support meeting (your clients, plus referrals)

Either process should take no longer than 10-15 minutes. Taking a few minutes to help clients place their first order will pay off in the long run and save you time by ensuring proper follow-through and by empowering clients to take advantage of 3<sup>rd</sup> party support offered by the company. This will minimize the need for follow up and support from you and your staff.

### **Enrollment Process during an Coaching Visit:**

**Step 1 – In regular Client Assessment Process, staff member or Health Coach identifies clients where weight loss is indicated or products will be additive**

**Step 2 – Health Coach Explains Program and recommends appropriate Protocol and/or Specialty Products**

- Personally explain program (you can use the Quick Start Guide) or use video
- Emphasize that we are a 2 phase program and not a diet (diets don't work)
- Reference credibility (26 years, 15,000 doctors recommend, Hopkins Clinical studies)
- Explain "5 and 1" program and weight
- Explain "BeSlim" for long term success
- Explain importance of compliance, support meetings and behavior modification
- Explain Weekly Support Calls and Support in Motion
- Explain cost savings if eating out or cost neutral if preparing own meals (\$8-\$10/day)
- Explain any discounts, starter packs, free shipping, and BeSlim Club
  - 5 week Variety Pak of "free week" is \$275 for 5 weeks of food using code TSFLFW
  - Customized orders use code HA2004 to get \$25 off
  - Client needs 20-22 boxes of food per month
  - BeSlim is a progressive discount for automatic shipment. Savings are 5% for months 1-3, 8% for months 3-6, and 12% afterward
- Recommend they see their doctor before doing anything to change their health

**Step 3 – Profile Client and Complete Forms**

- Complete Client Profile
- Create menu plan and fill out Order Form
- Review forms, and confirms clients' motivation and readiness

**Step 4 – Staff member places all initial orders**

- For initial orders, don't have your client call in their own order. Have your staff do it to insure your clients are registered properly and appropriate discounts are applied.
- Place client's first order by calling our Call Center 800-572-4417 or order online using your TSFL website.
- (If using the TSFL order forms orders can be faxed)

Your Health Coach ID is \_\_\_\_\_ and website is [www.groll.tsfl.com](http://www.groll.tsfl.com)

**Step 5 – What clients can do while waiting for medical food to arrive**

- ❑ Review Quick Start Handbook – This program guide (which comes with their food order) gives them all the basic information they will need to get started
- ❑ Give client welcome pack and have them read it prior to next phone meeting or visit
  
- ❑ Subsequent orders can be placed by client once entered in the system.

**Step 6 – Have client notify Health Coach upon receipt of Medifast foods to begin coaching**

**Enrollment Process for Referrals or During Weekly Support Meeting**

**Step 1 – Have client complete the Client Profile**

(w/ help from support staff or current clients)

- ❑ Health Coach reviews profile, and confirms clients' motivation and readiness
- ❑ Recommend appropriate labs (if necessary) from primary care Health Coach and notify their doctor they are beginning program

**Step 2 – Have client complete order forms - circle specialty products and appropriate protocol**

- ❑ Explain importance of compliance, support meetings and behavior modification
- ❑ Explain cost savings if eating out or cost neutral if preparing own meals
- ❑ Explain discounts, starter paks, free shipping, and BeSlim Club
- ❑ Schedule client for follow up (office visit or next support meeting for ongoing support & education)
- ❑ Explain Weekly Support Calls and Support in Motion
- ❑ Connect with a support buddy who's already on the program

**Step 3 – What to do while waiting for medical food to arrive?**

- ❑ Review Quick Start Handbook – This program guide (which comes with their food order) gives them all the basic information they will need to get started
- ❑ Give client welcome pack and have them read it and bring to next meeting

**Step 4 – Collect order forms & have staff member place all orders**

- ❑ For initial orders, don't have your client call in their own order. Have your staff do this to insure your patents are registered properly and appropriate discounts are applied.
- ❑ Place their first order by calling our Call Center **800-572-4417** or **order online using your TSFL website. (If using the TSFL order forms orders can be faxed)**

- Your Health Coach ID is \_\_\_\_\_1 and website is [www.groll.tsfl.com](http://www.groll.tsfl.com)
- ❑ Subsequent orders can be placed by client once entered in the system.

**Step 5 – Have client notify Health Coach upon receipt of Medifast foods to begin coaching**