Take Shape For Life® Client Tracking Sheet

Client name: _____ ID# _____
Process date: _____ Self-adjust: _____
User name: _____ Password: _____

Address: _____
City: _____ State: _____ Zip Code: _____
Best Time: _____ Time Zone: _____
Phone (work): _____ Phone (home): _____
Email (work): _____ Email (home): _____
Occupation: _____ Hours: _____

Exercise: _____
Frequency: ❑ daily ❑ 3-5 days/wk ❑ 1-2 days/wk ❑ None

Medications:
_____
_____
_____

Allergies: ❑ None ❑ Soy Other:
_____
_____

How did you hear about Take Shape For Life? _____
_____

WEIGHT-LOSS GOALS

Current Weight: _____ Height: _____ BMI: _____
How much weight would you like to lose? _____ pounds

Why do you want to lose weight?
1. _____
2. _____
3. _____

Which other weight-loss methods have you tried?

Plan/diet	Result

For you personally, what is the most difficult thing about losing weight?
_____
_____
_____

Is your family aware that you're starting this program? ❑ Yes ❑ No

On a scale of 1 *(not at all)* to 10 *(very)*, how motivated do you feel today? _____

Do you know of anyone who might want to start this program with you?
_____
_____
_____

Advised to consult doctor	
Date ordered	
On BeSlim®	
Date should receive	
Sent Welcome Packet	
Sent Quick Start Guide	
Instructed to take B&A	
Date started	
Sign up with SIM	
Sent email tips	
Went over QS Guide	
Day 1	
Day 2	
Day 3	
Day 4	
Week 2: first call	
Week 2: second call	
Week 3: first call	
Week 3: second call	
Week 4 call	
Placed second order	
Sent Referral Pad	
Requested business info	
Process date [01 - 31]	

DATE	Comments: TT = talked to LMA = left message on answering machine LMP = left message in person

Referral	Cost $	Yours

Attributes of a successful Health Coach *(circle all that apply)*

True to program
Referring family & friends
Accountable
Attractive personality
Self-motivated
Successful in other areas
Ambitious
Coachable

Business Opportunity Checklist

- ❑ Becoming a Health Coach DVD
- ❑ Sent informational email
- ❑ 3-way call w/Sponsor
- ❑ Present Business Plan in person
- ❑ Webinar
- ❑ Guest event
- ❑ Conference calls