



College of Healthy Body

Coaching Workbook



Chapter A: Role of a Health Coach/ Overview of Take Shape For Life

CONGRATULATIONS!

You're creating health for the 21st Century!

Your role as a Health Coach is unique to Take Shape For Life, and embodies the heart of what our company represents: Helping Others.

You are giving people tools to transform their lives, and helping them move along the path from surviving to thriving. What a great way to earn money!

As you help others, we help you. Though you're working for yourself, you're never by yourself, because you're surrounded with the Take Shape For Life Bio-Network—a vibrant community of Health Coaches, Health Professionals, and Home Office support—that can help you clarify any issue or answer any question you or your Client might have.

This Coaching Workbook is a correspondence course of the Health Institute Competency Study Guide (HICSG). Each tutorial provided is related to a segment of the HICSG.

Within every tutorial you will:

- Review an excerpt of the HICSG
- Receive an in-depth explanation of the HICSG concept
- View a sample coaching call that illustrates the concept
- Complete a related exercise.

The Coaching Workbook is designed to help you become the best Health Coach you can be. Please do not rush. Take time to analyze, absorb, and reflect on each exercise. By doing so, you will ensure that you are taking the steps necessary to build a successful Client/Coach relationship.

Better Together!

BASIC GUIDELINES

Because you're interacting with people and coaching them on important matters regarding their health, it's essential to understand your responsibilities, and to work within your limits.

You should carefully and thoroughly read the details of Take Shape For Life's policies, since you are responsible for knowing how to conduct your business properly and ethically.

Here are some basic definitions and guidelines to help you get started:

A HEALTH COACH...

- Serves as a valued consultant who helps Clients achieve Optimal Health.
- Coaches people as they follow the Medifast protocol to lose weight, manage disease, and get healthy.
- Assists Clients with care, knowledge, and professionalism, developing trusting and ethically-sound relationships.
- Provides ongoing support for Clients' long-term results through the weight-loss phase to the BeSlim[®] lifestyle.
- Encourages all Clients to consult with their physicians prior to the weight-loss phase of the program, and defers to the qualified health care provider in all matters affecting the Client's well-being.
- Shares his or her own experience and testimonial as inspirational tools.
- Educates, mentors, coaches, encourages, informs, solves problems, and celebrates the successes of his or her Clients.
- Serves as an example by following the BeSlim[®] lifestyle and actively striving for Optimal Health in his or her own life.
- Encourages other Health Coaches to duplicate his or her success and shows them how to do so.
- Functions as an independent contractor, not an employee of Medifast or Take Shape For Life.

A HEALTH COACH DOES NOT...

- Say that he or she “sells Medifast.” You are a consultant, not a salesperson. **Your Clients buy products directly from the company**, while you are paid to support and coach them in achieving Optimal Health.
- Refer to the weight-loss portion of the plan as a “diet.” We are a synergistic combination of nutrition and one-on-one support that succeeds where traditional diets fail.
- Make medical claims, provide medical diagnoses, claim to treat, prevent, or cure any disease, or offer any form of suggested or actual therapy.
- Put his or her clients at risk by acting as a nutritionist, psychologist, or therapist, or providing counseling outside his or her area of knowledge.
- Stretch the truth or otherwise communicate false information about Take Shape For Life or Medifast products. Unfortunately in our industry, there is a lot of false advertising and too many broken promises. Our medical heritage stresses the importance of only making claims that are backed by clinical research.

A BUSINESS BUILT ON IDEALS

The long-term success of your Take Shape For Life business depends completely on how well you support your Clients, and how well you teach other Health Coaches to duplicate your example.

Your business is a direct reflection of yourself, which is why it’s essential to coach your Clients with skill, thoroughness, and integrity. Here is a list of steps you can take to create a business that reflects your own ideals and those of Take Shape For Life:

1. **VISION: Clarify your objectives**

Start your journey with a clear picture of your personal and business goals (starting with your first 30 days CAB), and your plan and timetable for achieving them.

2. **CURIOSITY: Pursue knowledge**

- Become a student of Take Shape For Life.
- Read all the materials in your kit.
- Learn from your Sponsor and upline, and take advantage of support calls, leadership calls, and local and national training opportunities, including National Convention.

3. **DILIGENCE: Prepare yourself**

- Create your “100 List” and study your phone and presentation scripts.

- Download your order forms and Client Tracking Sheets, and order your business cards.
- Set up a business phone line and 3-way calling.

4. CONFIDENCE: Approach prospects

- Review your presentation materials (including your Presentation Book, DVDs, and “Virtual Judy” on the Web) and your talking points.
- Determine how you will reach out to each prospect and role-play approaches and presentations with your sponsor.
- Practice!
- Contact prospects by phone, letter, email, or in person.

5. PROFESSIONALISM: Present

Explain your role as a Health Coach, and present the opportunity for Optimal Health through Take Shape For Life.

6. INSIGHT: Profile your Clients

- Download the Client Tracking Sheet from your Office In Motion.
- Use candid conversation to learn about your Client and his or her needs, goals, and challenges.
- Follow up with the right questions and provide accurate and appropriate coaching.

7. EFFICIENCY: Take the order

- Help your Client determine what they like and offer suggestions on which Medifast Meals to choose.
- Offer free shipping on BeSlim[®] orders of \$200 or more.
- Explain the advantages of the BeSlim[®] Club, and encourage your client to sign up.
- Review the Exchange and Return Policy.
- Place the order immediately, and encourage your Client to call you when they receive their Medifast Meals.

8. RESPONSIBILITY: Build the relationship

- Follow up with your Client and ensure he or she has received the Welcome Kit (sent by the company) which includes the “Ready, Set, Medifast” piece outlining the 5 & 1 Plan, and the introductory DVD that walks Clients through program basics.
- Supply any additional literature, and email appropriate links and other information that meet your Client’s individual needs.

9. CARING: Provide support

- Encourage your Client to contact you daily for the first few days, which can be challenging as he or she achieves the fat-burning state necessary for weight loss.

- Encourage all Clients to take part in support calls.

Lasting Client relationships begin with a foundation of trust. Support your Clients from the start and help them be strong, reminding them that soon their hunger will lessen and then they will have the excitement of seeing results!

Remember, these steps are just the beginning of helping your Clients work toward Optimal Health. As you read further, you'll learn much, much more about supporting Clients for the long term, and helping them realize their goals.

With these guidelines in mind, you're ready for the most important lessons in your Take Shape For Life education: how to coach others and help them achieve their goals.

Question Right / Listen Right

Review

“It is important to understand from the Client’s perspective how his/her life story has affected their weight to help them address issues and move forward toward encompassing all possible strategies to help that particular Client.” (HICSG pg. 37)

Explanation

Although we have the best intentions, most of us do not “actively listen.” We dread silence, “dead air” if you will; we begin listening, but as soon as we get the flow of what we believe the person is saying, we start to formulate an answer. We then may find ourselves giving advice, even while the person is still talking. Consequently, we miss what is truly being said, and the opportunity to understand.

Active listening is one of, if not the most, important skills a Health Coach must possess. An effective Health Coach seeks to understand not only what the client says, but what he or she means. With an understanding of the Client’s need(s) or want(s), the Health Coach can begin the coaching process.

A Health Coach must:

- Learn to listen with the intent to understand, not to reply.
- Understand the facts about the Client’s present situation.
- Explore the Client’s dissatisfaction with where they are physically.
- Consider the implications of leaving the Client’s problems unsolved.

The following techniques will ensure a correct comprehension of the Client’s circumstances, needs, wants, and setbacks.

Check for Understanding

Ask open-ended questions, make inquisitive statements, and restate what the Client has said in your own words. This gives the Client an opportunity to clarify any misunderstandings. For example:

- 🕒 “So what you are saying is...”
- 🕒 “You said something earlier about...tell me more about that.”
- 🕒 “Let me see if I understood what you just said...Is that right?”
- 🕒 “So if I understand you correctly, you are currently...”
- 🕒 “So the challenge you have right now is...and because of that you are...”

Listen to Learn

People want to be heard.

- 1 Listen with the intent to understand.
- 2 Keep your own ego and beliefs in check. Coaches are not to theorize, analyze, or prescribe. Each interaction should be about your Client and what your Client wants, not what you think they want.
- 3 Avoid distractions. The Client deserves your complete attention.
- 4 Listen with your heart – want to understand what your Client thinks, feels, and believes.

Listen for Context Clues

Clients often say one thing and mean another. The table below illustrates context clues that may be useful while actively listening.

| | |
|---------------------------------|---|
| Wins | Where is the Client winning in life right now? |
| Needs | What's missing? Does the Client need more structure? Listen for emotional doors to open. |
| Strengths | What is the Client's unique strength? |
| Withholds | What issues does the Client seem to be dancing around? Making excuses for? |
| Shifts | Is the Client shifting: saying one thing but demonstrating another? If in person, observe eye contact, body language, and tone. |
| Truth & Authenticity | Does it appear as though the Client is engaging in honest self-disclosure? |
| Language / Self-Talk | Is the Client showing signs of self-sabotage? |
| Blocks | What appears to be running this person? Is it core beliefs? Do they think no one supports them? |
| Energy | Positive? Negative? How do you feel around this person? |
| Resolve | Has the Client reached goals before? Have they exceeded them? What are they currently struggling with? |

Coaching Call

This sample coaching call illustrates how a Health Coach actively listens. Notice how the Health Coach listens more than he speaks. By allowing the Client to speak, the Health Coach gets an in-depth understanding of the Client's current circumstances.

Client: Hi, my name is Eddie. My cousin Marcos referred you to me. He says that you're an excellent Health Coach and that you can help me lose weight.

Coach: It's nice to meet you, Eddie. I'm glad to hear that Marcos speaks highly of me. I would love to assist you with your weight loss. Tell me a bit about yourself.

Client: Well, I'm 27 years old. I've been overweight for what feels like my whole life.
(4-second silence)

Coach: Ok, so you say that you feel like you've been overweight your whole life.

Note: Notice the silence. Often when a Client ceases to speak, the Client either does not know what else to say or does not want to say too much. The Health Coach allowed the silence long enough to ensure that the Client was not simply pausing to organize his thoughts. The Health Coach then restated what the Client said in an effort to prompt the Client to provide more information.

Client: I haven't actually been overweight my whole life. It just feels that way sometimes. I gained quite a bit of weight after college. I have a desk job where I sit all day. I work long hours, often 10- to 12-hour days, so I eat a lot of unhealthy food. By the time I get home, I'm so tired that I watch some TV, feed my cat, catch up on my bills, and go to bed.

Coach: So your job takes up most of your day?

Client: Yes. I enjoy my job, but my current lifestyle does not allow me to live a healthy life.

Coach: I see.

Client: I used to be so active. I would play flag football on the weekends. I was so much happier back then.

Coach: Back then? What changed?

Client: I gained weight.

Note: The Client appears to be withholding information. The Health Coach asked what changed and the Client stated that he gained weight. The Health Coach must investigate what happened prior to Eddie gaining weight.

Coach: I'm sorry; I do not think I understand. You stopped being active because you gained weight?

Note: The Health Coach asked for clarification. Many Clients will expand on their original statements when encouraged to do so.

Client: Well, no. Once I starting working at my current job, I had less time to be active. So when I got home, all I wanted to do was relax. Between my sedentary lifestyle and my

bad eating habits, I started gaining weight. Before I knew it, I had put on so much weight. It wasn't until recently that I became concerned.

Coach: Do you mind if I ask what happened?

Client: The doctor says that I need to lose 45 pounds. She is worried that I am pre-diabetic. Can you help me?

Coach: I sure can. Together we will get you to lose those extra 45 pounds. Let me explain to you what Take Shape For Life is all about.

Exercise

Practice active listening with five friends and/or family members. Write a journal entry on each experience. Do you believe you understood what your family member or friend was trying to convey? Did your family member or friend believe that you understood? What could you have done to gain a deeper understanding?

Identify Stage of Change

Review

“It is essential to know the different stages of change, so you can identify where your Client is in the behavior-change process. Once you understand where in the process of change your Client is, you may be able to help them. Remember to keep a **non-judgmental** attitude and be accepting of the Client at their stage of readiness.”
(HICSG pg. 41)

Explanation

As a Health Coach assists the Client through the stages of change—pre-contemplation, contemplation, preparation, action, maintenance, and graduation—the Health Coach must implement the three stages of coaching: discovering, transitioning, and committing.

Within each stage of change, a coach repeatedly **discovers** and rediscovers the Client’s current circumstances, and helps the Client **transition** out of their current state and **commit** to a new way of thought and behavior. Once a Health Coach masters the stages of coaching, he will actively implement them within every stage of change.

The visual on the next page illustrates the three stages of coaching:

The Three Stages of Coaching

Discovering Stage



A Coach must build rapport with his clientele. Great rapport will yield trust. Once you have gained trust, the Client will honestly disclose his current circumstance. This will ultimately lead to a deep understanding of the Client.

Transitioning Stage



A sacred moment occurs between the coach and the client. As the client begins to visualize a healthier self, he may question if he can achieve his goal. A coach must recognize the client's hesitation and engage him in overcoming his doubt. This is the prime opportunity to assist the client with developing effective strategy.

Committing Stage



In the committing stage, the Client is ready to take the first steps on the journey to reaching a goal, overcoming a challenge, or pursuing a dream. The Coach's role in this stage is to move them from dream to reality, remove their fear, and move them to action.

Coaching Call

This sample coaching call illustrates how a Coach moves a Client from their current situation/reality toward a future designed by the Client. Notice how the Coach focuses on how to achieve the Client's goal rather than on what is in the way. Note how the Coach is practical, straightforward, optimistic, and empowers the Client while moving through the Three Stages of Coaching.

Coach: Hi, Lori! How are you doing? I certainly enjoyed getting acquainted with you in our session yesterday; how did day one go?

Client: Pretty good. Glad you called.

Coach: So what's on the agenda for today's call?

Client: Wow! Right down to business, huh?

Coach: You bet! What's on your list?

Note: No time spent on chit-chat. Your Client is counting on you to move her forward.

Client: Okay, with this 5 & 1 thing, I'm wondering if it's possible that it just won't work for me. I don't feel all that well; I also have two sick kids. I'm not sleeping well, and I had an awful fight with my husband. He is really not at all supportive. I think I told you about that yesterday. Didn't I?

Note: So far there is no clear agenda for today's call, just obvious frustration from the Client. Focus is needed. The Coach must acknowledge Lori's current situation, but keep the goal of the call in mind.

Coach: Yes, you did. I am sorry to hear that. Do you feel as though this is a good time to start the program?

Client: Absolutely, I'm tired of life getting in the way of my health!

Coach: Good for you! Since you are willing to continue, we will spend our time today moving you closer toward your goal. Remind me of what that goal is.

Client: My vacation—wearing a bathing suit and not wanting to cover up at the pool.

Coach: Okay, so instead of talking about your kids and your husband, you want to stay focused on your goal of getting to your ideal BMI by June 22, the day you leave for vacation.

Client: Yes!

Coach: Excellent! That's something I can help you with. So today's agenda is to review day one, yesterday. Let's first review your food intake.

Client: Ok, I did write it down in my journal as you asked. I ate four replacement meals, one snack, and drank four cups of water.

Coach: So, you did not eat all five meal replacements yesterday and you did not drink enough water.

Note: The Coach now knows that Lori has not followed the program, and by doing so, Lori is also forming incorrect conclusions about what is needed in order to succeed. The

Coach must help Lori find a solution, keep Lori's goal right in front of her, and help her recommit to the plan before the call is over.

Coach: Let's look at some ways you can be sure to get all of the Medifast Meals in, drink at least eight glasses of water, and get into the fat-burning state.

Client: Ok.

Coach: Something that works for me is to drink an eight-ounce glass of water immediately upon getting out of bed. Additionally, I bought a 64-ounce bottle that I fill up with water right after breakfast. I promise myself that I will not go to bed until that bottle is empty. Would that work for you?

Client: I could probably do that. Where did you buy the bottle?

Coach: I bought it at Target. Now let's talk about yesterday's food choices. Tell me about your Lean & Green Meal.

Client: I made chicken parmesan for the family for dinner. I did not eat the pasta with it, just the chicken and a salad.

Coach: Good job remembering to skip the pasta. Remember, if you don't get into the fat-burning state, what is likely to happen?

Client: I will continue to feel tired, maybe not get results. By not getting into the fat-burning state I probably won't meet my goal.

Coach: Exactly! And how will that feel?

Client: Not good. I won't want to go on vacation if I keep this up.

Coach: You're right, let's not let that happen. In the time that's left on our call today, what's the most important thing on your mind?

Client: Probably some reassurance from you about the program. Do you think I can really do this?

Coach: It is not important what I think. It is important what you think. But since you ask, I believe you can! Given what we have discussed on this call today, what are you going to do differently?

Client: I will drink 64 ounce of water, eat my five Medifast Meals today and anticipate moving into that fat-burning state!

Coach: I could not have said it any better. I'm cheering for you! And so are a lot of others. Remember the Nurse's Support Call tonight; it will help keep you motivated.

Client: Thank you so much. I actually feel more motivated already.



Exercise

Ask a family member or friend to discuss a goal he/she has. Attempt to assist him/her devise a plan and commit to it by employing the Three Stages of Coaching. Answer the questions below after completing the exercise and rate your experience.

Describe what the topic of discussion was in ten words or less.

What did you discover about your family member or friend's current circumstance?

How did you assist your family member or friend to overcome any doubt he/she may have and develop a plan?

How did you move your family member or friend into a state of action?

Could you have done anything better?

Goal Setting

Review

“Goals should be kept simple and be specific. Follow SMART guidelines when establishing goals. Goals should be:

- S**-Specific
- M**-Measurable
- A**-Achievable
- R**-Realistic
- T**-Time-bound

Encourage Clients to establish both short-term and long-term goals that are realistic.” (HICSG pg. 41).

Explanation

A Coach’s role is to help remove clutter from the Client’s final goal; remove the distractions. In order for a Health Coach to accompany the Client with this process, the Health Coach must first understand the Client’s ultimate goal.

What if you could help your Client move from chaos and confusion to clarity? What if living was not just going through the motions, stretched along a blurred string of days spent reacting to circumstances and demands? What if you could help your Client have true power, a “strategy” for life that led to the way they have always pictured it?

Stephen Covey says, “Begin with the end in mind.” How does one do this? It begins with the comprehension of the Client’s ultimate goal. Explore with the Client how it would feel, what else would change, as a result of being fit and thriving. Once you and the Client have a clear understanding of the ultimate goal, you can assist the Client with establishing short-term goals.

An excellent technique to employ when helping your Clients visualize their ultimate goal is journaling. Journaling often facilitates organization of thoughts. Through journaling, the Client is able to safely express dreams and aspirations, doubts, fears, frustrations, relieve stress, etc, which can clarify his or her view of Optimal Health.

With this tool in hand, the Health Coach may ask the Client to reference the journal throughout the coaching experience. Through dissecting the ultimate goal that is illustrated within the journal, the Health Coach can co-create short-term goals with the Client. Keep in mind that the Health Coach must **assist** the Client with the creation of short-term measurable goals. Do not create the goals for the Client, and remember that small actions lead to great accomplishments.

While setting goals, continue to move through the Three Stages of Coaching while observing, listening, and questioning. Compel your Client to think outside the box. Reinforce that their dream can be their reality. The ultimate goal will serve as an “anchor.” Anchoring is a way to give the Client’s experiences permanence. Journaling ensures that Clients always have access to their greatest resource, their inner creativity and power.

Note: Weight loss should NEVER be the long-term or ultimate goal. Setting weight loss (e.g. 40 lbs) as the end point sets your Clients up for rebound! For example, if your Client believes that once he/she loses 40 lbs that they are finished, they will most likely slip back into unhealthy habits; this pattern is inevitable. But, if your Clients change their goal to “living life at a healthy weight,” the likelihood that they will work to stay healthy will increase.

The first step to “living life at a healthy weight” is to get down to a healthy weight (short-term goal). The ultimate long-term goal should be Optimal Health. Let your Clients define their own vision of Optimal Health, such as feeling great, healthy weight, having lots of energy, being able to play active sports, traveling in comfort, being able to walk dog... the list can go on and on. Optimal Health as a goal is the foundation to making healthy choices. Optimal Health is a never-ending goal. When your Clients tell you their goal is a weight loss of ___ lbs., always guide them away from that way of thinking and toward the concept of Optimal Health.

Remember, getting down to a healthy weight is only the beginning. Prompt your Clients to read *Dr. A's Habits of Health* for a greater understanding.

Coaching Call

This sample coaching call illustrates how a Coach co-creates short-term goals with the Client by using what the Client has written within the journal. Notice how the Coach focuses on how to obtain the Client's goal rather than on what is in the way. The coaching is practical, straightforward, optimistic, and empowering to the Client!

Coach: Well, hello, Michelle. How are you today?

Client: I'm ok. How are you?

Coach: I am well. Did you begin journaling as we discussed the last time we spoke?

Client: Yes. I've never written in a journal before. I hope I did it right.

Coach: There is no wrong way to journal, Michelle. I'm sure you did a great job.

Client: Well, it was a lot of fun. Honestly, I thought journaling would be a chore. But, I found that the more I wrote, the more I enjoyed it. It may sound corny, but I really learned a lot about myself.

Coach: Really, like what?

Client: I realized just how stressed I am. I never seem to get enough sleep, I feel as though I am being pulled a million different directions. No wonder I don't eat well. There is no way I could ever find enough time to prepare healthy meals. How am I ever going to be able to eat right with my lifestyle?

Coach: You pose an excellent question: How will you be able to eat right with your current lifestyle? Did you describe what your ideal lifestyle would be?

Client: Yes. I did as you asked the last time we spoke. My first journal entry was about my ultimate goal. I described what Optimal Health looks like to me.

Coach: Would you mind sharing that with me?

Client: Sure. If my life were perfect, I would have the energy to keep up with my children. You know, Laura began little league softball last week. I wasn't even able to practice pitching with her because I had no energy after work. That broke my heart. She really wanted me to help her. She ended up practicing with her friend Cara and Cara's mom. My kids are only young once and I'm missing everything.

Coach: I see, so you would like an increase of energy. What else did you write?

Note: The Health Coach remained on task. The Health Coach could have chosen to talk about the Client's children, but chose to move the conversation along by redirecting the Client.

Client: I wrote that I would like to wear a size eight dress. My sister is getting married in four months and I'm the maid of honor. I would also like to get off my cholesterol medication. I want to be the envy of all my friends. I'm tired of being the "big" friend! I would love for my husband to look at me the way he did when we were younger.

Note: The Client has illustrated what means most to her. Michelle has feasible long-term goals, each of which is possible. The Health Coach must express that she understands each goal. The Coach must then isolate one goal to concentrate on.

Coach: You will have more energy, be a size eight, and reduce your cholesterol. Together we will achieve your dream. You did a wonderful job expressing yourself!

Client: Is this too much to ask?

Coach: Absolutely not! Your goals may seem far-fetched, but they aren't. We need to start small and create short-term measurable goals that will make each long-term goal attainable. Which goal would you like to explore today?

Client: Let's work on my energy. I think that if I have more energy, the other goals will be easier to achieve.

Note: Now that the Health Coach has isolated one goal, she may assist the Client with the formation of attainable short-term goals. The Health Coach must remember that she is co-creating goals; the Client must also be involved.

Coach: I agree. You'll be glad to hear that Take Shape For Life has helped many Clients like you gain more energy.

Client: Really. How?

Coach: Well, it begins with committing to the 5 & 1 Plan. Once you get into the fat-burning state, you will notice an increase in energy. As you progressively lose weight, you will find that you will also progressively gain energy.

Client: You know, now that you mention it, I have had a little more energy. And I've only been on the program for a week and a half.

Coach: Just imagine how much energy you will have as you continue on the program.

Client: I guess I will feel more energetic over time.

Coach: You bet! Do you think you can commit to the 5 & 1 Plan?

Client: Oh yeah! It's really easy. It almost seems too easy.

Coach: Well it sounds like we have created our first short-term goal. You are on your way to Optimal Health!

Client: Wow, we did. This is great! I feel good about this. I can do this, I can reach my goals! Thanks so much!

Exercise

Good coaching does not ignore the emotional realm, but feelings must lead to action. Visualization must lead to strategy.

What is one of your ultimate goals?

As seen within the Coaching Call, Michelle began to move away from her goal as she spoke about her children. Do you find that your emotions get in the way of visualizing your goal? Begin journaling your doubts, fears, frustrations, thoughts, etc. about the goal you wrote above. Once completed, answer the following questions.

Now that you have expressed the setbacks related to your goal, do you have a better understanding of your ultimate goal? Explain.

What short-term goals will help you achieve your ultimate goal?

Isolate one short-term goal. List it below.

Commit to the short-term goal you just wrote. Continue to journal. Once you have achieved the short-term goal, review your journal. Note how the process helped you remove distractions from your ultimate goal.