INSTITUTE FOR INTEGRATIVE NUTRITION
THE WORLD'S LARGEST NUTRITION SCHOOL

Health History Outline

Preparation

A. Call them the day before and confirm their session.
B. Prepare your program agreement according to your current rates.
C. Practice closing the deal segment.
D. Handouts
   1. Health History
   2. Program Agreement
   3. Welcome
   4. Goals
   5. Session Notes
E. Optional Giveaways
   1. Binder with handouts in it
   2. *Integrative Nutrition* book (or other giveaway)
F. Read Coaching Tips handout and have it handy
G. Center yourself and the space

Step 1: Welcome them and thank them for coming.

Step 2: Have them fill out the Health History form. We recommend having them fill it out with you in person. If it is a phone consultation, you can ask them the questions verbally.

Step 3: Discuss Health History

A. What interested them in coming?
B. The conversation is about their main health concern.
C. **Listen—be a detective.**

Step 4: Generally explain the following concepts

A. Balance between primary and secondary foods
B. Look at their diet—what are 3-5 things they could be doing for themselves but aren't doing?
C. **No recommendations—whet their appetite.**

Step 5: Close the deal.

A. How was this session for you today?
B. What did you like?
C. Would you like to hear about my program?
D. Explain the content of your six-month program.
E. Is this something you would be interested in?
F. Address their strongest concern slowly but strongly.
G. Would you like to know my rates?
H. Be very clear about how much you charge.

Step 6: Sign them up.

A. Get the program agreement from the binder. Sign, keep one for your records and give one to them.
B. Get their post-dated checks or credit card information at the Health History.
C. Book the first session right then, even if it is not ideal.

Step 7: Giveaways

A. Binder with handouts in it
B. *Integrative Nutrition* book (or other giveaway)

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Step 8: Post-session follow up: ASAP after your session

A. If they did sign up
   1. Create a folder for your records with the following:
      a. Their Health History form
      b. Signed Program Agreement
      c. 12 revisit forms
      d. 12 session notes
      e. Client Progress form
      f. Giveaway Checklist
   2. Add the client to your email list.
   3. If the next session time was not ideal, follow up and make one that is.

B. If they didn't sign up
   1. Send them a thank-you note.
   2. Add them to your email list (with their permission).