

# Acquiring Clients

Clients are the lifeblood of your Take Shape For Life® business. Proper development and support of your Clients will result in improved health for them and a stable and growing long-term business for you—a wonderful business that you can feel great about as you help America get healthy and remain healthy, one person at a time.

Take Shape For Life® is a prescription for life. It is a lifestyle change and NOT a short-term “quick fix” diet. We all know diets alone without proper behavior modification generally don't result in lasting weight loss. Maintaining a healthy weight and moving toward long-term Optimal Health occurs when people adopt the Habits of Health and learn to eat properly and make the necessary changes in both behaviors and lifestyle.

With regard to people who are overweight, your goal as a Health Coach is to help them safely and quickly reach their ideal weight—as measured by their Body Mass Index (BMI)—and then teach them the behavior modifications and lifestyle changes necessary to remain at a healthy weight for the rest of their lives.

This 2-phase approach cannot be emphasized enough:

- Phase 1: Safe and Rapid Weight loss
- Phase 2: Transition to the BeSlim® lifestyle for lifelong weight control

Without Phase 2, if your Clients go back to their former eating habits and lifestyle behaviors, they are likely to regain their weight. Obviously, neither they nor you want this outcome. Therefore, teaching BeSlim® is critical for long-term success!

## Six Steps to Optimal Health—BeSlim®

To achieve Optimal Health, there are six things that we must do as part of our decision to lead a healthy lifestyle. They have been thoroughly researched and are proven to be the fundamental behaviors for long-term weight control. They can be remembered easily in the acronym **BE SLIM**. As a Health Coach, you will want to implement these behaviors into your life and share them with your Clients and Health Coaches.

# BeSlim® ...for life!

**B**reakfast: It's critical for your body to start the day properly! You need high-quality fuel—protein and carbohydrates—to give you the nutrition you need for energy and mental clarity to cope with today's demands. Breakfast is our most critical meal and yet one-third of Americans fail to begin their day with it. However, with successful adaptation of the Habits of Health philosophy and our convenient Medifast® Meals, you will always eat breakfast!

**E**xercise: Exercise is a key component to our lifestyle because it enhances so many aspects of our lives. It increases our metabolism so we will burn fuel, provides us with greater flexibility and strength, improves our bone structure and posture, increases our mental clarity, and improves our immune system, to name just a few of the benefits. Although not necessary in the beginning phase of a weight-loss program, adding a daily activity of more movement is essential for long-term health. Whether someone just consciously incorporates more movement, begins the habit of daily walking, or gets involved in aerobic exercise or weight-resistance training, exercise is critical for Optimal Health.

**S**upport: A key component to stay on track in adopting a healthy lifestyle is having the support of a Health Coach to provide the necessary coaching, tools, and education. If you have a caring coach and mentor, that person can support you with your healthy goals, stay in touch as you advance through your journey to a healthier life, tweak your program if needed, discuss “issues” you may be having, and provide knowledge. In addition, with Take Shape For Life® you have access to the Virtual Clinic and Support in Motion online and you can participate on all the interactive Nurse's, Doctor's, and Maintenance Support Calls.

**L**ow-fat meals five to six times a day. Eating frequently, controlling portion sizes and total calories, and restricting fat intake are key cornerstones for Optimal Health. Unfortunately, it is virtually impossible with our hectic lives to achieve these objectives without tremendous effort and expense. Take Shape For Life® provides the logical solution with low-fat, convenient Medifast® Meals, delivering high-quality fast food to help maintain our health goals.

**I**ndividual plan: We all need a PLAN for eating properly. Proper menu planning—which in maintenance includes two to three Medifast® Meals a day as healthy snacks—and adapting the skills and strategies you'll need to navigate through a hostile environment full of temptations and nutritional pollution, are keys to adopting a healthy lifestyle.

**M**onitor: Once you've achieved your healthy goal weight, you'll want to stay there. Frequent monitoring is the key. Simply weighing yourself on a regular basis, or trying on a snug pair of jeans once a week to check how they fit, can literally catch a problem before it gains momentum!

The BeSlim® lifestyle is an integral part of our program. It is proprietary and trademarked to Medifast®, Inc. and Take Shape For Life® and is one of several distinguishing elements of our program that separate us from others in this industry. Most companies deal in weight loss, putting people on “diets.” We, on the other hand, move people beyond weight loss alone. BeSlim® is a powerful solution for lifelong weight control. (Please refer to the information in the Appendix on BeSlim® and the BeSlim® Assessment—scorecard—for keeping yourself and your Clients on track for long-lasting weight control.)

## Moving People Beyond BeSlim®

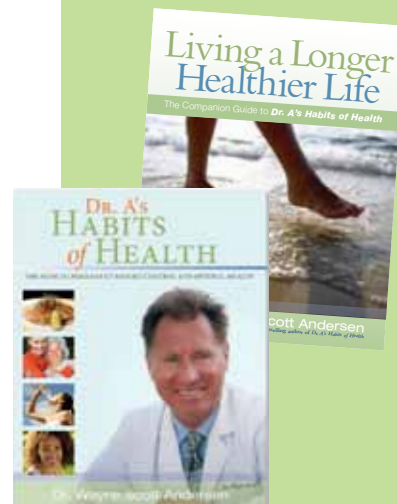
In his groundbreaking, landmark book, *Dr. A's Habits of Health*®, Dr. Wayne Andersen has provided both Health Coaches and our Clients with a comprehensive guide to move people beyond BeSlim® alone. In this book, Dr. Andersen combines current cutting-edge, research-based knowledge with practical application that gives readers the answers to living healthier and longer lives. The book is organized into four distinct areas that teach people how to:

- Reach a safe healthy weight
- Achieve lifelong weight control
- Move toward Optimal Health
- Live longer and healthier lives

Dr. Andersen's book and its companion guide, *Living a Longer Healthier Life: The Companion Guide to Dr. A's Habits of Health*®, are a must for all Health Coaches; you will want to know them inside and out. In addition, it is recommended that you encourage all of your Clients to own and read these books. After all, their current and future health could depend on it.

## The Role and Responsibilities of a Health Coach

As a Health Coach, you provide an important and honorable role to your Clients and it is therefore vital that you perform this service with care, knowledge, and professionalism. See yourself as a trusted and valued consultant who helps people



**You are a consultant, not a salesperson!** You bring tremendous ongoing value to your Clients.

You are not "selling" products to Clients. Rather, they buy directly from the company.

Your role is to be a coach, supporting Clients as they follow the protocols of the Medifast® 5 & 1 Plan™ which utilizes portion-controlled Medifast® Meals purchased directly from Take Shape For Life®.

Your Clients pay you nothing to coach them. Take Shape For Life® pays you!

*Everything about your business revolves around this fundamental tenet: Serve Clients properly and help them reach their goals for Optimal Health and your business will be successful.*

restore their health and improve the quality of their lives. You are providing a program, a product, and a service that can make an enormous difference in someone's life.

Being a successful Health Coach is much more than making a presentation and taking an order. The real role of a Health Coach is to educate, mentor, coach, encourage, inform, answer questions, and celebrate successes with your Clients. To be effective, you must be accountable, dependable, trustworthy, honest, caring, and knowledgeable. The more value that you put into yourself, the more valuable you will become to your Clients.

Your Take Shape For Life® business is really all about developing trusting relationships that last a lifetime. If you perform your duties as a Health Coach with excellence, your business will grow. In addition, if you teach other Health Coaches to duplicate the example you set, your business will explode!

## Outcomes of Proper Coaching

You are the messenger and not the message

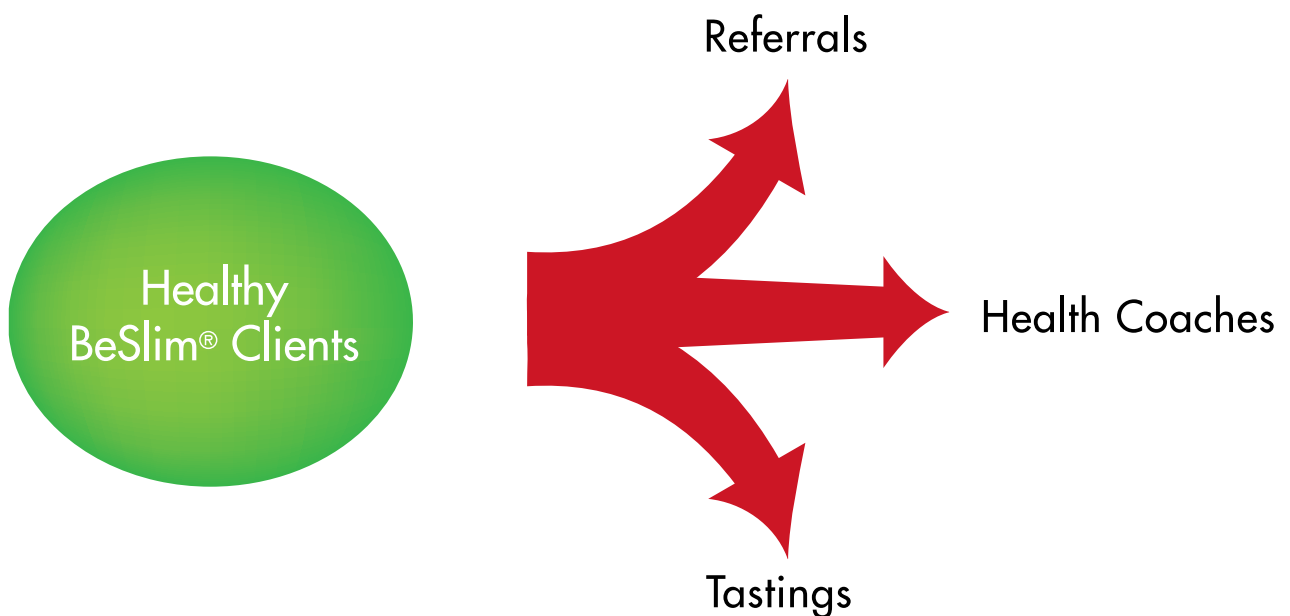


Illustration 9.1: Proper Coaching

*The long-term viability of your business rests upon how well you support your Clients and how well you teach your Health Coaches to duplicate your example. Therefore, it is critical that you perform your duties with skill, thoroughness, excellence, and integrity. Successful execution of this vital part of your business cannot be underestimated!*

Coaching is never “about you.” It’s about your Client and how you can best serve that individual to help them reach their Optimal Health goals. There is an old saying: *“People don’t care about how much you know until they know how much you care.”* As a Health Coach, you are foremost a communicator who should be genuinely interested in helping your Clients succeed, not in trying to impress them with how much you know.

It is not the role of a Health Coach to give lengthy scientific explanations of how certain physiological processes of the body work or to offer medical or psychological counseling. Rather, it’s your role to give understandable and practical coaching for people to implement while losing weight on the Medifast® 5 & 1 Plan™ and moving toward their health goals.

In the vast majority of cases, the questions you answer and the coaching you do will be relatively routine, meaning that as you take advantage of the support provided and gain knowledge, you will probably know the answers to over 95 percent of the questions you will ever get. However, when questions arise that require more detailed explanation to which you may not know the answers, you are surrounded by an array of additional support. You simply become the messenger who points your Clients in the right direction to get the help they need.

For example, if a Client asks if a specific medication she is taking will affect her results on the 5 & 1 Plan™, rather than having to be a physician or getting a degree in pharmacology, you can simply have the Client get on the Wednesday night Doctor’s Call. Or, if a Client has issues with motivation to stay on the program, rather than becoming a psychologist, you can refer them to chapter 3, “Motivation for Change,” in *Dr. A’s Habits of Health®*. You can also encourage them to listen to the weekly support calls and go online to Support in Motion. Having this level of support takes you off the hook in terms of thinking that you’ll need to know everything!

There is one other smart reason for being the messenger and not the message. Because many of your Clients may eventually decide to become Health Coaches and “pay it forward,” it is important that in your dealings with Clients you make it easy for them to understand the advice and coaching you give. By following your example, your style, and your effectiveness in coaching, many may later decide to join your team of Health

Coaches. Of course not all Clients will, but from the outset of your coaching with them you want your Clients thinking three things:

1. I can do this.
2. I have the time to do this.
3. It looks like people are having so much fun, I want to do this!

If you are doing a great job of coaching, many of your Clients will join you as Health Coaches. If your Clients think you know more than they could ever know or if they think they need some kind of advanced degree in order to be an effective coach, then you have become non-duplicatable and you will have very few people join you as Health Coaches. Bottom line: Keep it informative and simple.

## Two Components in Working with Clients: Acquisition and Support

As you develop a great Health Coach business, you will be involved in two major kinds of activities.

1. Acquiring Clients
2. Supporting Clients

First, there is the process of acquiring Clients and second, once you have acquired them, there is the ongoing activity of supporting your Clients. In the remainder of this chapter, we will focus on Client acquisition. In the next section we will focus on Client support.

### The Process of Acquiring Clients

There is a systematic and progressive sequence of events that occurs as you enroll Clients in Take Shape For Life®. The following will outline this process and then follow up in more detail with each step.

## Steps in Acquiring Clients

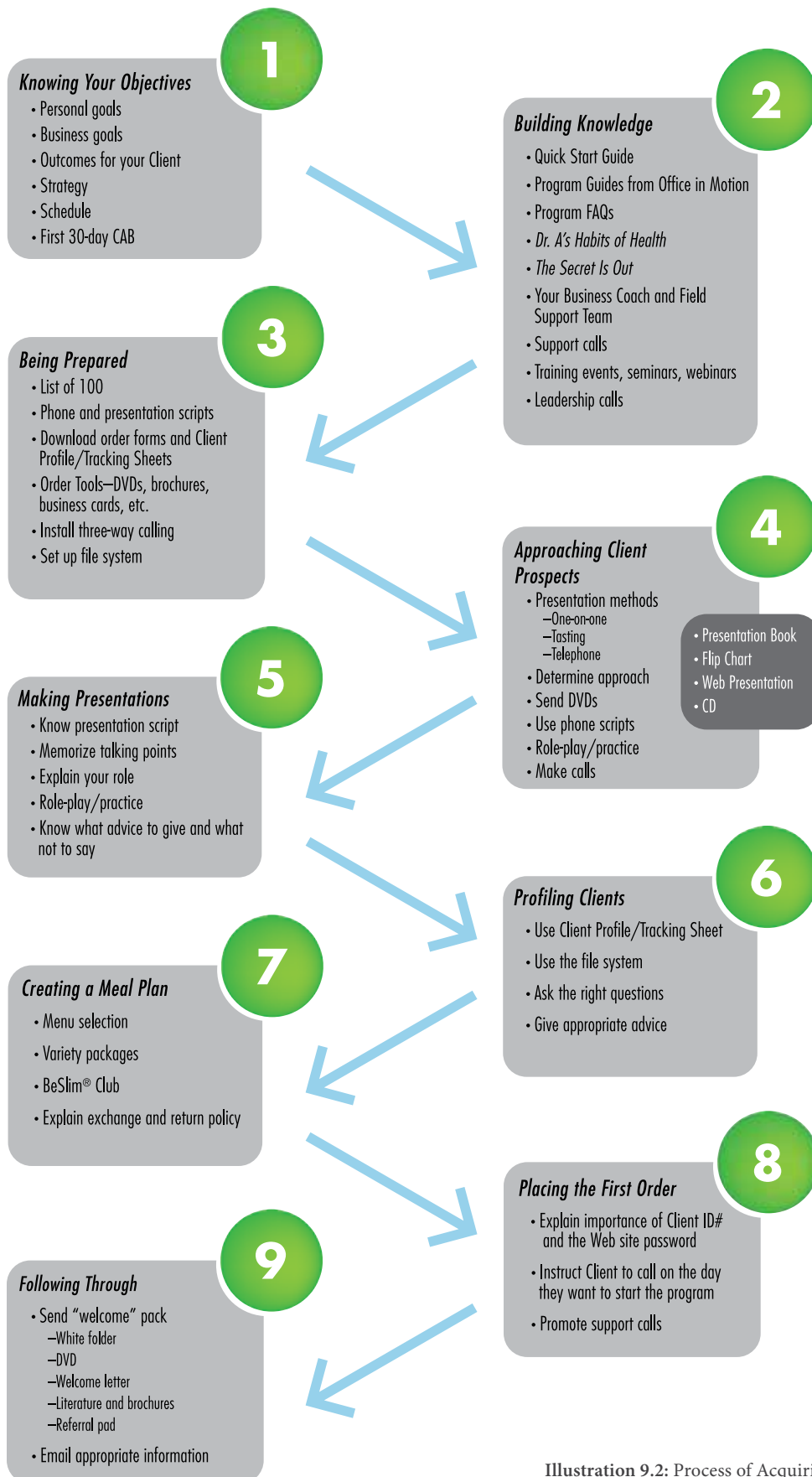


Illustration 9.2: Process of Acquiring Clients

Each of the above steps is covered in detail in the following pages.

# 1

## Knowing Your Objectives

These objectives speak to your reasons for being a Health Coach and are both personal and altruistic goals. If you have completed the exercises on getting clear on your reasons for doing this and if you have created a strategy, the motivation for you to talk to Clients is clear. You also understand that if you talk to people and enroll them as Clients and coach them, you are significantly helping people in their lives. Remember, the reason our business works so well is rooted in the fact that both Clients and Health Coaches benefit greatly from the Client/Health Coach relationship.

If you are a brand new Health Coach, then you have the additional motivation to make sure you reach your goal of at least five frontline Clients and \$1,000 in frontline orders in your first 30 days so that you will earn you Client Acquisition Bonus.

Beyond your personal and altruistic reasons, here are some important objectives as you start working with potential Clients:

1. ***Have a positive expectation in terms of the outcome.*** Assume every potential Client will want to go on the program. Not all will, but if your expectation is positive, more will be interested than if you think they won't be.
2. ***Be committed to the success of your Client.*** Successfully coach your Client to better health—from weight loss to transition to learning the BeSlim® lifestyle and the Habits of Health—and they will become Clients for life.
3. ***Treat every Client from day one as if they will become a Health Coach someday.*** Your excellent service will both set an example and educate them. Remember, you want them thinking, "I can do this," "I have time to do this," and "These Health Coaches are having so much fun, I want to do this!"
4. ***Always remember the outcomes of successful coaching.***
  - A healthy Client and a Client for life who becomes either:
    - A referral advocate
    - A Health Coach
    - A Tasting host

### The Economic Value of a Client

There are many ways to measure the worth of Clients. They become your friends, they promote your business, and sometimes they join you in business. However, in purely economic terms, it is easy to make an approximation of the financial benefit you can realize from one well-served Client who understands the BeSlim® lifestyle of long-term weight maintenance.

An average first order for a Client is around \$300, and then roughly \$300 for each month they are on the Medifast® 5 & 1 Plan™. Once in the maintenance phase, the average order is around \$150. Let's see how that translates in income for a Health Coach who is performing his or her role with excellence.

### Assumptions:\*

- Weight loss @ \$300 a month for 3 months
- Maintenance @ \$150 a month for 9 months
- You are paid as an Executive Director

Retail Commission:  $\$300 \times 20\% = \$60.00$   
 Growth Bonus:  $\$150 \text{ CV} \times 30\% = \$45.00$   


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 $\$105.00/\text{month}$   
 $\$105 \times 3 = \$315.00$

Retail Commission:  $\$150 \times 20\% = \$30.00$   
 Growth Bonus:  $\$75 \text{ CV} \times 30\% = \$22.50$   


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 $\$52.50/\text{month}$   
 $\$52.50 \times 9 = \$472.50$

### A "Good" Client

- Could be worth \$787.50 in year one and \$630/year in year two and beyond!

## 2

## Building Knowledge

Take Shape For Life's® products and programs—along with your personal coaching—affect the health and well-being of other people. Therefore, it is vital that you gain as much knowledge as possible in the areas that are critical to your business.

*You cannot coach or teach what you do not know—and you can't make it up as you go!* Regarding knowledge, you can't afford to be lazy or take shortcuts. It's not fair to your Clients and it could actually be harmful if you give them wrong advice.

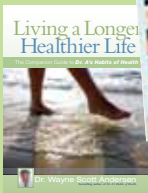
*Take your role as a Health Coach seriously.* Nobody wants a Health Coach who doesn't know what they are doing. In our business, it's not just unprofessional, it's unethical! Clients look to their Health Coach for support, information, and guidance. They are not just buying a product when they begin a weight-loss or health-management program; they are buying you! You are the "value-added" part of the equation. The more

*\*The earnings of Take Shape For Life® Health Coaches are not necessarily representative of the income, if any, that a Take Shape For Life® Health Coach can or will earn through his or her participation in the Take Shape For Life® Compensation Plan. Your success depends upon your skills, work effort, and market conditions. Take Shape For Life® does not guarantee any level of income or your success.*

**Q. What's the best way to read Dr. A's Habits of Health®?**

**A. One chapter at a time!**

Set a goal today to read one chapter a day. There are only 26 chapters, so you can complete it in less than a month!



*Living a Longer Healthier Life: The Companion Guide to Dr. A's Habits of Health®* is the workbook that can help make the difference between just reading about creating Optimal Health and actually doing it.

knowledgeable you become, the more valuable you are to your Clients and this increases your opportunity to succeed.

Becoming knowledgeable also has the side benefit of educating yourself to improve and extend your health and the quality of life for you and your family.

Learning the basics of this business is fun, interesting, and should not take very much time. In addition, the information is straightforward and easy to grasp. So, embrace the process and learn as much as you can as quickly as you can.

## Sources of Information and What You Need to Know

Medifast® and Take Shape For Life® provide Health Coaches with excellent information on the products, protocols, and programs offered by the company. One source for this information is in the components of the Take Shape For Life® business materials you purchased when you became a Health Coach. You'll find additional information in brochures, newsletters, training manuals, on your Web site, and in the Back Office of your Web site. Plus, on the weekly support calls, you'll get tremendous product and program training, as well as Client support training. Other sources of information to gain knowledge can come from books and current industry articles. Of all of these resources, the most significant information sources to tap into are this *Business Blueprint* and *Dr. A's Habits of Health®*.

This *Business Blueprint* was designed to give you a foundation of the basic things you will need to know to become a great Health Coach from a business perspective. It is your business guide. Similarly, *Dr. A's Habits of Health®* is the ultimate resource for learning the health side of our business. It is your Clients' and your guide to Optimal Health.

Among many facets of learning our coaching model, at the root of your understanding you will need to learn the protocols of the Medifast® 5 & 1 Plan™. You will need to understand how and why it works and what the contraindications are. You will also need to learn, live, and embrace the BeSlim® lifestyle and use the BeSlim® Assessment yourself.

Much of this information is in the Quick Start Guide and in *Dr. A's Habits of Health®*. Additional information can be found in the Medifast® book, *The Secret Is Out*.

We will review what you need to know about the Medifast® 5 & 1 Plan™ later in this section.

## Certification

As was explained earlier in this manual, Health Coaches who intend to succeed in a significant way with Take Shape For Life® will want to take the optional Health Coach Certification Course offered online by The Health Institute. This excellent training will take your knowledge to the next level and is something that you should consider as you progress with your business. In addition to increasing your knowledge and confidence, certification brings prestige—identifying you as a professional—and creates additional opportunities such as the eligibility to approach Health Care Professionals, permission to approach companies about instituting weight-loss and wellness programs, and the privilege of being an exhibitor at conferences, trade shows, and conventions.

Certification should be a goal for every Health Coach who wants to build a business beyond just having a “hobby” that pays well.

## Literature to Review

If you want to get a good handle on the basics of the Medifast® and Take Shape For Life® products and programs, here is a list of information for you to take advantage of:

- Quick Start Guide
- Basic Competency Exam Study Guide
- Product Catalog
- *Business Blueprint*
- First 8 chapters of *Dr. A's Habits of Health*®

These are the most important pieces of literature for a new Health Coach to read and study first. You will need them to pass your Basic Product and Program Competency exam. Once you have mastered this material, you will want to continue learning. The next set of information for review is:

- Program Guides and Tools from your Library in Office in Motion
  - Frequently Asked Questions
  - Medifast® 5 & 1 Plan™ Information Sheet
  - Clinical Studies
  - Medifast® for Diabetes Guide
  - Do's and Don'ts Sheet
  - Exercise Guide
  - Medifast® for Seniors Guide
  - Medifast® for Teens Guide
  - Transition & Maintenance Guide
- The Medifast® Book, *The Secret Is Out*

## Corporate Support Resources



Illustration 9.3: Health Coaches Bio-Network

## Field Training

As you start on your journey as a Health Coach, it is important to understand that you don't have to know everything in order to get started. One of the great things about our business is that you get a lot of "on the job" training so you are learning while doing. Additionally, you have lots of resources available to you to support you in this new endeavor, so it is comforting to know that, in the beginning, you don't have to do it all alone.

Field training comes in the form of personal support, meetings and events, conference calls, and Webinars. Let us look at each one separately.

**Personal Support:** A large part of your support will come from your Business Coach and the Field Support Team—people who comprise your "line of sponsorship" to the company. These individuals have a stake in helping you succeed in your new business and are a powerful resource for you. Develop good working relationships with these individuals. Meet with them and learn from them. This is especially true in the early stages of your business.

One role your Business Coach has is to help you get your new business started successfully. That person, and the Business Coaches and Business Leaders who support them, are a tremendous source of information and support you can tap into. In the beginning, your Business Coach should be willing and able to teach you how to enroll and coach new Clients. Ask them to be your mentor and to help you develop a few Clients so you can observe how they do it.

This learning experience could be through three-way calls involving you, your potential Client, and your Business Coach; face-to-face meetings with your candidates; group meetings; Tastings; Webinars; or a combination of these methods. Listen and take notes on these opportunities to learn. In addition, make sure you follow up by asking questions about the presentations you've observed. Think of yourself in this role as an apprentice learning a trade from a master. Your Business Coach has the knowledge, or access to the knowledge, to help you grow a great business.

Your Business Coach and Field Support Team can't do it all for you, and you wouldn't want them to anyway. They have other Clients and Health Coaches to attend to and more important, you need to get on your feet! The sooner you learn how to acquire a Client, the better. So, after your Business Coach has helped you with a few presentations, make sure you begin doing them on your own!

**Meetings and Events:** Meetings and events come in all sizes and venues, ranging from training sessions in someone's home to weekly local training meetings to regional seminars to Take Shape For Life® National Convention.

If you have access to local regular training meetings, make it a habit to attend them whenever they are scheduled. Treat these events with high importance and make the effort to attend them. As a Health Coach, you are not required to attend anything—after all, it is your business. However, if your intention is to be as knowledgeable a Health Coach as you can be, you will want to commit to attending the meetings you qualify for.

If you do not have any weekly training events in your area, then begin building a local team and start one! Even if you hold meetings in your home, it's a great start! Remember that in every area where Take Shape For Life® now has established Health Coach teams holding regular events, at some point in the past there were none there either. Someone—or a small group of people—decided to step up to the plate and take the leadership to start a regular meeting. For many of these leaders, their businesses have grown from those humble beginnings to large organizations.

Regional and National Events are very important to both you and the Health Coaches in your organization. At these events, you will get excellent training from the top leaders in the company and see a much bigger picture of the vision of Take Shape For Life®. The company holds a National Convention every summer, and it is a “must attend” for anyone serious about building a large Take Shape For Life® business. Statistics bear out—by a wide margin—that people who attend these kinds of functions tend to be much more successful with their businesses than those Health Coaches who stay at home. You won’t want to miss it!

**Conference Calls:** You will get excellent product and program training and a sense of community by listening to the various conference calls made available by Take Shape For Life® and its Field Leadership each week. Three of these calls are designed to support Clients, but they also inform and train Health Coaches at the same time. In addition, we have a weekly Leadership Call designed specifically for training Health Coaches. In the early part of your career with Take Shape For Life®, you will probably want to check out all of these calls. As you become more knowledgeable about the products and the programs, the need to be on the support calls becomes less important. However, *you should attend the Leadership Call every week.*

### Weekly Support Calls

Each week, Take Shape For Life® offers three fantastic support calls for Clients and Health Coaches, and one training call specifically for Health Coaches. These interesting and interactive calls are educational and inspirational.

- **Nurse's Support Call**—Hosted by one of the Take Shape For Life® support nurses, this call is designed for Clients and Health Coaches. It’s an interactive forum, usually with a guest speaker that’s fun, inspiring, and informational. Make sure you and all of your Clients attend these calls each week. (646) 519-5860, pin 0971#; Replay: (212) 461-8672
- **Stay in Shape!! Maintenance Call**—Another interactive question/answer 30-minute call with topics helpful to those Clients who have lost weight and wish to keep it off to. (512) 225-9427, pin 77421#; Replay: (512) 505-6863
- **Doctor's Support Call**—This call is hosted by one of the Take Shape For Life doctors and is designed to discuss current topics regarding health and wellness, and to answer callers’ questions. (646) 519-5860, pin 0971#; Replay: (212) 461-8671
- **Take Shape For Life® Field Leadership Call**—This weekly Leadership Call is an absolute must for any Health Coach interested in building a successful business with Take Shape For Life®. (512) 305-4638, pin 99662#; Replay: (512) 505-6854

**Health Coach Acquisition Conference Calls:** Both live and recorded conference calls provide information on the opportunity to become a Health Coach with Take Shape For Life®. These calls are an excellent way to invite Business Prospects to hear from successful Business Leaders about our business model and how it works.

**Webinars:** Both Take Shape For Life® Home Office and the Field utilize Webinar technology to reach people. Webinars allow for people to watch presentations on their computers in real time over the Internet while listening to presenters explain the content of the presentation. Like conference calls, Webinars are useful for both training and Client/Health Coach acquisition. To watch a Webinar, you will receive an email with a link to a Web site that will enable you to watch and listen. It's simple; all you need to do is click on the link and follow the instructions.

## 3 Being Prepared

Good preparation gives you confidence, so make sure you are both mentally and physically prepared as you launch your business. Here are a few checklists to review:

### *What You Will Need to Make Calls and Do Presentations:*

- ✓ Your list of 100 candidates
- ✓ Phone scripts (*discussed in the next section*)
- ✓ Talking points on the products and program (*discussed in the next section*)
- ✓ Presentation script (*discussed in the next section*)
- ✓ Three-way calling installed on your phone

### *Tools You Need to Have on Hand:*

*Note: Some of these may have come with your Health Coach Application materials and some you will have to order.*

- ✓ Business cards (order from your Web site)
- ✓ The File Folder System
- ✓ *Achieving Optimal Health* DVD\*
- ✓ *Dr. A's Habits of Health*®\*
- ✓ *It's Not Your Fault* CD\*
- ✓ *Setting Your Life in Motion*® CD
- ✓ Telephone numbers for conference calls, support calls, and Dr. Andersen's call to introduce the role of a Health Coach
- ✓ Your Web address to show potential Clients

\*You can use these items as great "pre-conditioning" tools for potential Clients to create interest in the program.

**Get the most current  
Take Shape For Life®  
order form.**

*To ensure you always  
have the latest version  
of the order form,  
download it from your  
Take Shape For Life®  
Web site each time you  
want to use it.*

- ✓ The Web address for Dr. Andersen's Web site: [www.DrWayneAndersen.com](http://www.DrWayneAndersen.com)
- ✓ Health Highlights generic newspaper handout
- ✓ Referral pads
- ✓ Brochures, newsletters, folders
  - White TSFL folders (to hold brochures, documents, DVDs, CDs, etc.)
  - Quick Start Guide
  - Program brochures
  - Take Shape For Life® Business Opportunity brochure
  - Taking Shape For Life newsletters or similar "testimonial" information
  - Clinical study abstracts
  - Take Shape For Life® handout
- ✓ Download the following documents from the Library in Office in Motion and print them to be used as handouts, or email them as attachments when needed:
  - Program Guides from your Library in Office in Motion
    - Medifast® for Diabetes Guide
    - Exercise Guide
    - Medifast® for Seniors Guide
    - Medifast® for Teens Guide
    - Transition & Maintenance Guide
    - Other program guides that you may feel you'll need
  - Frequently Asked Questions
  - Medifast® 5 & 1 Plan™ Information Sheet
  - Clinical study abstracts
  - Do's and Don'ts Sheet
  - BMI (Body Mass Index) Chart
  - BeSlim® Assessment
- ✓ Download and print these documents from the Back Office to be used for taking orders and answering Questions:
  - Client Profile/Client Tracking Sheet
  - Client Profile Reference Sheet
  - BMI Chart
  - Take Shape For Life® order form

You may also want these on hand for reference:

- Medifast® Product Profile Chart
- Medifast® Product Claims

- ✓ Prepare generic letters and emails to be readily customized for each individual (see below):
  - Potential Client Letter (and email version)
  - Potential Client Follow-Up Letter (and email version)  
*For people who've requested more information*
  - New Client Welcome email
  - New Client Welcome Kit letter
- ✓ Have your follow-up packs ready beforehand so that if you need to mail something, you have it nearly ready to go.
  - Potential Client Information Pack
  - New Client Welcome Kit

*Note: Take Shape For Life® includes a Welcome Kit with every first-time order that a newly registered Client receives. The Welcome Kit includes a Welcome DVD, "Ready, Set, Medifast®" brochure, "The 'Medi' in Medifast®" sheet, "Support: The Heart of Take Shape For Life®" sheet, Take Shape For Life® Quick Start Guide, and order form.*

## Sample Letters, Emails, and Pack Contents

Sample letters and email files are located on the User Guide and Samples Disc, as well as online in the Library in Office in Motion. These samples can be tailored to reflect your specific needs and Client information.

### Sample Letter 1

Generic, long-version letter (on the next page): To be sent to someone you've spoken with regarding the program who has asked for more information. You would include this in a white Take Shape For Life® folder with other materials (*see Potential Client Information Packs below*).

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*For efficiency and convenience, make several of the various kinds of information packs in advance. That way when you need one, you'll have it ready to go!*

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January 1, 2010

1600 Pennsylvania Ave.  
Anywhere, USA 12345

Dear \_\_\_\_\_,

It was a pleasure speaking with you today and thank you for your interest in learning how you can take control of your health utilizing the Optimal Health Programs of Take Shape For Life®. This letter will provide you with some follow-up information and an overview of our products and programs. Once you've had a chance to review the information, please feel free to give me a call or email me with your telephone number and a convenient time to call you.

#### **Background information on Take Shape For Life® and Medifast®**

As I mentioned to you, I am a Health Coach with Take Shape For Life®, a wholly owned subsidiary of Medifast®, Inc. Medifast® is a 30-year-old company listed on the New York Stock Exchange (NYSE: MED) and has the reputation of being the premier nutritional solution for weight management in America. The company produces safe and effective, doctor-formulated, portion-controlled meals for weight management. These products have been recommended by over 20,000 doctors and used by over one million people since 1980.

Take Shape For Life® (TSFL) is the professional coaching arm of Medifast® and is now its largest division. TSFL is comprised of Health Coaches who are lay people as well as physicians, chiropractors, and other health care professionals. All Health Coaches are trained to help their Clients follow the protocols of our programs and to support and coach Clients as they move toward Optimal Health.

Medifast® and Take Shape For Life® offer programs designed to help people lose weight safely. Rather than treating symptoms with drugs, our approach is to use nutritional intervention to target obesity and being overweight, the root causes of many diseases.

In relation to weight loss, we offer a unique approach: First, we help Clients safely and quickly reach their healthy weight; second, we teach them the skills, behaviors, and habits of health for long-term success. With our help, Clients are successful because they are taught how to maintain a healthy weight for life using our BeSlim® lifestyle approach. Success rates are significantly higher when Clients work with a knowledgeable and caring Health Coach rather than trying to do the program alone.

What's exciting about our program is that people get predictable results that literally change their lives. As you watch your progress on the program, you should see dramatic positive health changes.

#### **The challenge before us**

As you are aware, we are witnessing a major health crisis in America today. Two-thirds of adult Americans are obese or overweight. Over 30 percent of our children are overweight, and half of them are also obese. According to a Baylor University study, if this trend continues, by 2022 over 80 percent of us will be overweight.

Being overweight is very dangerous and leads people down the slippery slope to diabetes, heart disease, arthritis, liver disease, and certain types of cancer. In fact, being overweight is quickly becoming the #1 preventable disease generator in America ... soon to overcome diseases caused by tobacco use. The human and

financial costs of this epidemic are enormous and are beginning to threaten our health care system. Our goal at Take Shape For Life® is to help reverse that trend and to help people create health in their lives rather than react to disease.

#### Some facts on the Take Shape For Life® solution and why it works:

1. Medifast® manufactures the products and Take Shape For Life®, through its network of Health Coaches, delivers the program.
2. Take Shape For Life® is physician-led, and the program and products were developed by doctors.
3. Our program is both safe and proven, with multiple clinical studies including a published study by researchers from major university teaching hospitals, including the Johns Hopkins Bloomberg School of Public Health.
  - Johns Hopkins Weight Management Center—For over 8 years, the Johns Hopkins Weight Management Center in Baltimore, Maryland, has used Medifast® products for its very-low-calorie programs.
4. The products are either whey-based (35 percent) or heart-healthy soy-based (65 percent) meals and do not contain harmful herbs or stimulants.
5. We are NOT a diet. Diets rarely work long-term because, statistically, 85 percent of people who diet will regain the weight within two years if they don't change their underlying behaviors. We offer a comprehensive program to safely and quickly help people lose weight and then teach them how to keep it off for life.
6. On our program, Clients eat five Medifast® Meals per day (you can choose from over 70 delicious choices) and one Lean & Green™ Meal consisting of lean protein such as chicken, fish, or lean beef and non-starchy vegetables.
7. The program is easy to follow. Clients typically don't feel hungry and they can expect to lose up to two to five pounds per week.
8. The cost for the meals is about \$11 a day. However, since Clients are redirecting their food budget, the money they spend is “cost-neutral” because they are not eating other foods—with the exception of their one Lean and Green™ Meal—while on the program. Furthermore, the cost for coaching from a Health Coach is included in the cost of the food. Clients do not pay Health Coaches for coaching; Take Shape For Life® pays Health Coaches.

\_\_\_\_\_, you mentioned you want to lose weight. I can help coach you through that process. For your review, I have included a DVD entitled *Achieving Optimal Health*, a CD entitled, *It's Not Your Fault* and some literature. In particular, please read the Quick Start Guide, as it will cover the program completely. You can also get more information by going to my website: [www.\\_\\_\\_\\_\\_.TSFL.com](http://www._____.TSFL.com). If you go online, don't order just yet. Instead, touch base with me first and I can give you some additional savings on your first order.

Lastly, to understand my role as your Health Coach, please take two minutes to listen to a recorded message from Dr. Wayne Andersen, Co-founder of Take Shape For Life® and Medical Director of Medifast®, Inc. at (866) 200-6719.

I look forward to talking with you again and—if this looks like the program for you—I'll welcome the opportunity to help you get started and to coach you as you optimize your health by reaching your goal weight.

In Health,

Your Name

Certified Health Coach # 0000000

987-654-3211 Office

123-456-7899 Cell

Youremail@XXXXXX.com

[www.\(yourwebsite\).TSFL.com](http://www.(yourwebsite).TSFL.com)

## Sample Letter 2

Generic, short-version letter: To be sent to someone you talked to regarding the program who has asked for more information. You would include it in a white Take Shape For Life® folder with other materials (see Potential Client Information Pack contents).



January 1, 2010

1600 Pennsylvania Ave.  
Anywhere, USA 12345

Dear \_\_\_\_\_,

It was great meeting you on the plane yesterday. As promised, I am sending you information on the Take Shape For Life® programs featuring Medifast® Meals that you requested. After reviewing our program, products, and benefits for becoming one of our valued Clients, I am certain that you will choose us to help you (or a family member) obtain Optimal Health!

Our program features only the best. Since 1980, Medifast® has been recommended by over 20,000 doctors and clinically researched. It has been proven safe and effective in successfully burning fat and ridding the body of unhealthy and unwanted weight.

As my Take Shape For Life® Client, I will provide you with the tools, support, and education to fit your specific needs. There are no sign-up fees or hidden costs ... you only pay for the Medifast® Meals for your personalized program—all from the comfort of your home. Your Medifast® Meals will be sent directly to you, and you may choose your level of support. There are no mandatory meetings to attend but, if you choose to, you can participate in live weekly support calls from nurses and doctors, and you will get access to a free online support community called Support in Motion as part of the services I provide.

Enclosed is a DVD that explains our fabulous programs, products, and company. I am also sending a CD called *It's Not Your Fault* for you to review. Please feel free to share them with anyone you know who is interested in losing weight or getting healthy. If you do, we have a great referral program that gives you credit on future purchases with each referral that orders! I also invite you to check out my Web site, [www.yourwebsite.TSFL.com](http://www.yourwebsite.TSFL.com). It will give you a very informed look into what we have to offer. Click on "shop online" to view our products. When you are ready to order, please call me for great savings on your first order. I take great pride in my Clients' satisfaction and look forward to designing the perfect program to fit your needs!

Health and Happiness,

Your Name  
Certified Health Coach # 0000000  
987-654-3211 Office  
123-456-7899 Cell  
Youremail@XXXXXX.com  
[www.\(yourwebsite\).TSFL.com](http://www.(yourwebsite).TSFL.com)

## Sample Letter 3

Generic, short-version welcome letter or email: To be sent in a welcome pack or with appropriate attachments in an email.



January 1, 2010

1600 Pennsylvania Ave.  
Anywhere, USA 12345

Dear \_\_\_\_\_,

Congratulations for your recent enrollment in Take Shape For Life®! I am excited for you as you begin this journey and want you to know that I will be here to support and to help you in your efforts to lose weight and reach your health goals.

I want you to be completely successful with Take Shape For Life® and it is very important that you thoroughly understand the program before you get started. Therefore, please look over all of the information that you will receive in your new Client Welcome Kit—in particular, the Welcome DVD with instructions and the Quick Start Guide (I am enclosing one here so you can get a headstart reading it—it is critical you read it cover to cover before starting). Also, please print and review the attached documents to this email. When you receive your order, make sure to give me a call so I can answer your questions and review your program to get you started properly.

For additional support, make sure to take advantage of the free support calls offered by the company:

- Nurse's Support Call: Monday, 8:30-9:00 p.m. ET. (646) 519-5860, pin 0971#. This is an interactive question/answer call mixed with guest speakers and helpful information (TSFL nurse host).  
Replay: (212) 461-8672
- Doctor's Call: Wednesday, 8:30-9:00 p.m. ET. (646) 519-5860, pin 0971#. This is an interactive question/answer call mixed with educational/health-related information (TSFL doctor host).  
Replay: (212) 461-8671
- "Stay in Shape!" Maintenance Call: Wednesday, 8:00-8:30 p.m. ET. (512) 225-9427, pin 77421#. Another interactive question/answer call with topics helpful to those customers who have lost weight and wish to keep it off. Replay: (512) 505-6863.

I look forward to a wonderful relationship with you as you "Take Shape For Life®!"

Health and Happiness,

Your Name  
Certified Health Coach # 0000000  
987-654-3211 Office  
123-456-7899 Cell  
Youremail@XXXXXX.com  
www.(yourwebsite).TSFL.com

## Sample Letter 4

Generic, long-version welcome letter or email: To be sent in a welcome pack or with appropriate attachments in an email.



January 1, 2010

1600 Pennsylvania Ave.  
Anywhere, USA 12345

Dear \_\_\_\_\_,

Congratulations on becoming a Client with Take Shape For Life® featuring Medifast® Meals and taking a big step toward improving your health! I am excited for you because it sounds like you have the determination to implement the necessary changes to reach your ideal weight and stay there for a lifetime as you progress toward Optimal Health. Before you know it, you'll be healthier and you'll be looking and feeling better!

I wanted to send you some information that will help you get started on the right track. For information on my role as your Health Coach, please take a moment to listen to a two-minute recorded message by Dr. Wayne Andersen, the Co-founder of Take Shape For Life® and Medical Director of Medifast®, Inc. That number is (866) 200-6719. I'd also recommend you go to my website [www.\\_\\_\\_\\_.TSFL.com](http://www.____.TSFL.com) to get a further understanding of what Take Shape For Life® is all about.

I placed your order this afternoon right after we spoke and your products should ship \_\_\_\_\_. Your order number is \_\_\_\_\_ and since you decided to become a BeSlim® Club member, you received an additional 5% discount, a free week of food, and a book about the Medifast® Program called *The Secret Is Out*. I also ordered Dr. Andersen's book, *Dr. A's Habits of Health*®, with your Variety Package, as you requested. As a BeSlim® Club member you received free shipping because your order was over \$200. Your credit card was charged \$\_\_\_\_\_. The products ship from Maryland and should arrive toward the end of this week \_\_\_\_\_.

I want you to be completely successful with Take Shape For Life® and it is very important that you thoroughly understand the program before you get started. Therefore, please look over all of the information that you will receive in your new Client Welcome Kit—in particular, the Welcome DVD with instructions and the Quick Start Guide (I am enclosing one here so you can get a headstart reading it—it is critical you read it cover to cover before starting). Also, please print and review the documents attached to this email. When you receive your order, make sure to give me a call so I can answer your questions and review your program to get you started properly.

For additional support, make sure to take advantage of the free support calls offered by the company:

- Nurse's Support Call: Monday, 8:30-9:00 p.m. ET. (646) 519-5860, pin 0971#. This is an interactive question/answer call mixed with guest speakers and helpful information (TSFL nurse host).  
Replay: (212) 461-8672
- Doctor's Call: Wednesday, 8:30-9:00 p.m. ET. (646) 519-5860, pin 0971#. This is an interactive question/answer call mixed with educational/health related information (TSFL doctor host).  
Replay: (212) 461-8671
- "Stay in Shape!" Maintenance Call: Wednesday, 8:00-8:30 p.m. ET. (512) 225-9427, pin 77421#. Another interactive question/answer call with topics helpful to those customers who have lost weight and wish to keep it off. Replay: (512) 505-6863.

As I mentioned to you, we have a terrific online support tool called Support in Motion. You can chart your progress, use a meal planner, chat with other members, get some great recipes, and learn all kinds of healthy tips. To find it, just go to my website [www.\\_\\_\\_\\_.TSFL.com](http://www.____.TSFL.com). Click on "support center," then click on the link to Support in Motion, watch the tutorial, and log in. You can also find it by going to [www.TSFLSupportInMotion.com](http://www.TSFLSupportInMotion.com). I have already signed you up so simply use "\_\_\_\_\_" as your user name and "\_\_\_\_\_" as your password. I think you will love this new support tool.

Because you have signed up for the BeSlim® Club (our progressive savings program), you automatically began saving 5% on this order and for the next 2 months of orders. Months 4 through 6 your savings go to 8 percent and then for month 7 and beyond it will be 12 percent. This program not only saves you money but also rewards you with points that can be redeemed for some great products. But best of all, with the BeSlim® Club you'll never run out of Medifast® Meals! In about three weeks you will receive an email asking you if you want TSFL to send you the same order as you ordered last month or if you'd like to change or cancel the program. At that time, I will help you adjust it so that you can order exactly what you want in your next order.

Your TSFL Client ID # is \_\_\_\_\_ (please write it down). In the future, you can call in your order to Take Shape For Life® at (800) 572-4417, through me, or order online at [www.\\_\\_\\_\\_.TSFL.com](http://www.____.TSFL.com). For ease of online ordering, use the same user name, "\_\_\_\_\_" and password, "\_\_\_\_\_" we used for Support in Motion. If you forget your user name and password, you can have it emailed to you, or call (800) 572-4417 to get it.

As I mentioned, make sure you take a good digital "before" photo prior to beginning your weight-loss journey. Then, when you get down to your healthy weight, take an "after" picture! It's always inspiring to see the changes as the weight starts to come off.

Lastly, as you begin to lose weight, people will be noticing. When they ask you what you're doing, please tell them you are working with me and feel free to give them my contact information. When you do, they will be sure to have someone on whom they can rely for coaching and support, and I'll make sure that you get a referral fee of \$\_\_\_\_ to be applied to your next order for each referral that becomes a Client. Or alternatively, as you lose weight and gain confidence in the program, you may want to consider joining us as a Health Coach and then I'll teach you how to support your own Clients. (Over 80 percent of our Health Coaches were first Clients who had a positive experience with the program.)

\_\_\_\_\_, I am happy for you as you begin this journey and I am looking forward to working with you. I want you to know that I will be here to support and help you in your efforts to lose weight and reach your health goals. We'll take it one day at a time and before you know it, you'll be back within the normal ranges for someone your height and age. In a few months, you'll be amazed at how good you feel and look!

If you ever have any questions, feel free to give me a call.

Health and Happiness,

Your Name  
Certified Health Coach # 0000000  
987-654-3211 Office  
123-456-7899 Cell  
Youremail@XXXXXX.com  
[www.\(yourwebsite\).TSFL.com](http://www.(yourwebsite).TSFL.com)

## Potential Client Information Packs

Suggested contents for an *information pack* to send a *potential Client*:

- White Take Shape For Life® folder
- Your business card
- Personalized letter from you
- *Achieving Optimal Health* DVD
- Clinical study abstracts
- *Taking Shape* newsletters (or similar "testimonial" information)
- Program brochure
- Quick Start Guide
- BMI chart
- Product catalog

Suggested contents of *email attachments* to send a *potential Client*:

*Immediately email:*

- Personalized email from you with these attached:
  - PDF of the Quick Start Guide, clinical study abstracts, BMI chart, and Medifast® 5 & 1 Plan™ Sheet

*Follow with a mailing:*

- White Take Shape For Life® folder
- Your business card
- *Achieving Optimal Health* DVD
- *Taking Shape* newsletters (or similar "testimonial" information)
- Program brochure
- Take Shape For Life® handout
- *It's Not Your Fault* CD
- Product catalog

Suggested contents of *email attachments* followed by a mailing to a *new Client*:

*Immediately email:*

- Personalized welcome email from you with these attached:
  - PDF of the Quick Start Guide, BMI chart, the Medifast® 5 & 1 Plan™ Sheet, Do's and Don'ts sheet, your helpful tips

*Follow with a mailing*—Suggested contents of welcome mailing for a *new Client*:

- Personalized welcome letter from you
- White Take Shape For Life® folder
- Your business card
- *Achieving Optimal Health* DVD
- *It's Not Your Fault* CD
- Quick Start Guide
- Do's and Don'ts sheet
- Medifast® 5 & 1 Plan™ sheet
- BMI chart
- Product catalog
- Referral pad
- BeSlim® Assessment

# 4

## Approaching Client Prospects

You have many ways to present information about your Take Shape For Life® products and programs:

- In person, with or without your Business Coach
- By telephone, with or without your Business Coach on a three-way call
- Via group presentations/Tastings
- Using the *Achieving Optimal Health* DVD
- Sending them to your Web site
- On a Webinar or conference call
- Using a PowerPoint presentation
- Using your black TSFL portfolio as a presentation piece

You will adjust how you approach someone depending upon the type of presentation you are doing.

### Making Telephone Calls

Calling is the fastest method to get in touch with someone. In a matter of a few minutes, you can contact a person and have them engaged in the process of learning more about Take Shape For Life®.

#### The Purpose of a Telephone Call

The purpose of the call is to determine if someone is interested in getting more information and then setting up a way to provide it via one of the presentation methods mentioned above. When calling, you are simply checking someone's interest to learn if they are open to hearing how to lose weight or manage their health through nutritional intervention. If they are, you can direct them on how to get more information.

With some people—if it is a good time to talk—you may be able to present to them immediately. With others, you may want to set up an appointment to speak with them either face-to-face or over the telephone later. With others, you may be inviting them to a tasting or other meeting venue. Alternatively, you could decide to first send your potential Clients to your Web site, or send an information folder containing a cover letter, literature, and a DVD or CD (or both). You could even invite someone to listen to the nurse's or doctor's support call ... and then follow up with your presentation.

---

*Tell personal stories of others that highlight success in weight loss that may be relevant to your Prospect.*

---

### **General Tips on Approaching Potential Clients:**

- Study the scripts in this manual but make sure to write a script using your own words and commit it to memory. But when you call, don't read a script; instead, use talking points.
- Relax and have fun—you are helping people!
- Know why you are calling. Have your dreams and goals in front of you and also realize you are doing someone a favor by offering the program to them.
- Set up several appointments in one calling session. It is easier and more time-efficient.
- Have your list of names and phone numbers ready to go so you do not waste time looking up numbers.
- Determine beforehand how many people you will call and stick to your plan.
- Practice your calls with your Business Coach or spouse before you call so you will feel comfortable and prepared.
- Do not worry about making the perfect call! Just start calling!
- Have a positive expectation.

### **Control the Direction of the Call**

The flow should take you from “hello” to setting up an appointment.

- Identify yourself, set your potential Client at ease, and engage in small talk.
- Explain your reason for calling them.
- Ask them The Big Question (see below).
- Check their interest and qualify them.
- Set and confirm the appointment and then get off the phone.

### **Telephone Script: Calling a Potential Client**

This approach can be modified to invite people for all of the presentation methods.

- Identify yourself; engage in brief small talk. (Keep this short!)

Hello \_\_\_\_\_, this is \_\_\_\_\_, how are you doing today (how's work, your children, etc.)?

- Explain your reason for calling them.

Listen, the reason why I am calling is...

I am very excited about a program I have been on to lose weight and to finally get healthy!

I do not know if you have noticed or not, but I have dropped \_\_\_ lbs (inches, sizes, etc.) and it was one of the easiest things I have ever done!

\_\_\_\_\_, I have to tell you, I feel terrific!

Because of my success, I have shared this with some of my close friends and family, and they are having similar results!

- Ask them The Big Question (Version A)

\_\_\_\_\_, I was wondering if you would do me a favor. Do you know anyone who...

- *Is trying to manage their weight?*
- *Might be looking for a safe, effective, and easy solution to become healthier?*

- Ask them The Big Question (Version B)

\_\_\_\_\_, you and I have talked before about losing weight and I wondered if you'd be interested in learning more about this program?

### Your Potential Client is Interested, Now What?

- **Option A:** Continue your conversation and do your presentation, profiling, and order taking immediately.
- **Option B:** Set up an appointment for a future time to present the program with your Client over the phone.
- **Option C:** Set up an appointment to present the program and products with your Client in your home or their home.
- **Option D:** Invite your Client to an event, a Webinar, a local weight-loss or wellness seminar, a tasting in your home, etc.

### Where to go next for *Option A, B, and C*:

*Client:* Wow, this sounds like something I'd be interested in, how do I find out more?

*You:* Well, \_\_\_\_\_, do you have some time now? If so, I can give you some information right now over the phone.

If the answer is "yes," proceed with your presentation.

If the answer is "no", ask the following:

*You:* Ok then, let's set up a time when we can get back together to discuss this in more detail. We can either talk over the telephone or we can get together face-to-face, which do you prefer?

Where to go next for **Option D** (to invite to a Tasting):

*Client:* Wow, this sounds like something I'd be interested in, how do I find out more?

*You:* Well, \_\_\_\_\_, I'm glad you asked! I'm having a Tasting—an informational get-together—at my house next \_\_\_\_\_ at 7:30 and I would like you to attend. It's going to be a lot of fun.

*You:* My Health Coach, the person that has helped me lose weight, is going to be there and they will be giving an overview of the program. We will be discussing...

- *Why diets often don't work long term and why this comprehensive program does work.*
- *How to achieve Optimal Health by getting someone to their ideal weight and by learning the habits of health, healthy lifestyle choices.*

*You:* And, we will taste some great nutritious food!

*You:* When we finish, if this sounds like something for you, then we can customize a program for you.

## Answering Questions Before Your Presentation

Keep in mind that unless you are going to immediately go explain your products and program, most questions that a potential Client may ask will be covered in your presentation. So, when someone asks a question, simply do one of the following:

1. Give a short answer and ask your potential Client for the appointment.
2. Answer their question with a question.

*Any question:*

That's a great question, and I'll (we'll) be covering that in detail when we get together. Now, \_\_\_\_\_, you mentioned you want to get more information, let's set up a time to meet. I've got some time on Wednesday or Thursday, do either of those days work for you?

*What is the company?*

The company is Take Shape For Life®—a division of Medifast®, Inc.—and its products and programs have the reputation of being one of the leading weight-loss and nutritional solutions in America.

The products are time-tested for over 30 years and have been clinically proven at major research universities.

Now, \_\_\_\_\_, you mentioned you want to get more information, let's set up a time to meet. I've got some time on Wednesday or Thursday, do either of those days work for you?"

In the meantime, I will send you out some information to review and you can also go to my Web site at [www.\\_\\_\\_\\_\\_.TSFL.com](http://www._____.TSFL.com) to learn more.

## 5

### Making Presentations

As was mentioned earlier, you have many ways to present information about your Take Shape For Life® products and programs:

- In person, with or without your Business Coach
- By telephone, with or without your Business Coach on a three-way call
- Via group presentations/Tastings
- Using the *Achieving Optimal Health* DVD
- Sending them to your Web site
- On a Webinar or conference call
- Using a PowerPoint presentation
- Using your black TSFL portfolio as a presentation piece

In all of these methods, the general information covered is the same, with allowances made for the special customization you may want to include for your specific audience. In the following pages, we will discuss the general areas and talking points to cover when speaking to a potential Client.

#### Which Presentation Method is Best?

The best presentation method is the one that helps you acquire a new Client! In reality, each method has its own advantages and you will probably use several methods interchangeably as you build your business.

#### Tastings and Other Group Presentations

Conducting Tastings allows for simultaneous multiple exposures to the products and programs of Take Shape For Life® and is therefore an excellent way for a Health Coach to quickly acquire new Clients and generate large orders while efficiently managing time.

Some Health Coaches use Tastings to create an ongoing stream of new Client revenue and as a source for sponsoring new Health Coaches. A Tasting can be as simple as showing the DVD and/or Presentation Book, followed by a sampling of Medifast® Meals. This model works particularly well for people who are focused on developing frontline orders and who feel most comfortable leading their business with the products and programs versus leading with the opportunity.

Tastings are also an excellent way to get a new Health Coach started by helping them efficiently establish new Clients and earn their Client Acquisition Bonus quickly. Learning how to present the products and programs in a group setting is a great skill set that all Health Coaches will want to master.

## Understanding How the Program Works

Before you make a presentation it is important to understand the protocols of the Medifast® 5 & 1 Plan™. You can get that information from the Quick Start Guide and you can add to that knowledge by reading *Dr. A's Habits of Health*®. In the beginning, it is a good idea for you to read the Quick Start Guide several times (and then once per month) to make sure you know what it contains, inside and out.

A useful illustration to know is the following schematic called “How It Works.” Once you understand this chart, you will be able to describe with accuracy the 2-phase approach we teach and how and why the Medifast® 5 & 1 Plan™ works so well!

**Before**—People gain weight from accumulation of excess fat because their calories consumed are greater than their calories burned. The body does what it is designed to do; when it sees a surplus of energy, it stores it as fat.

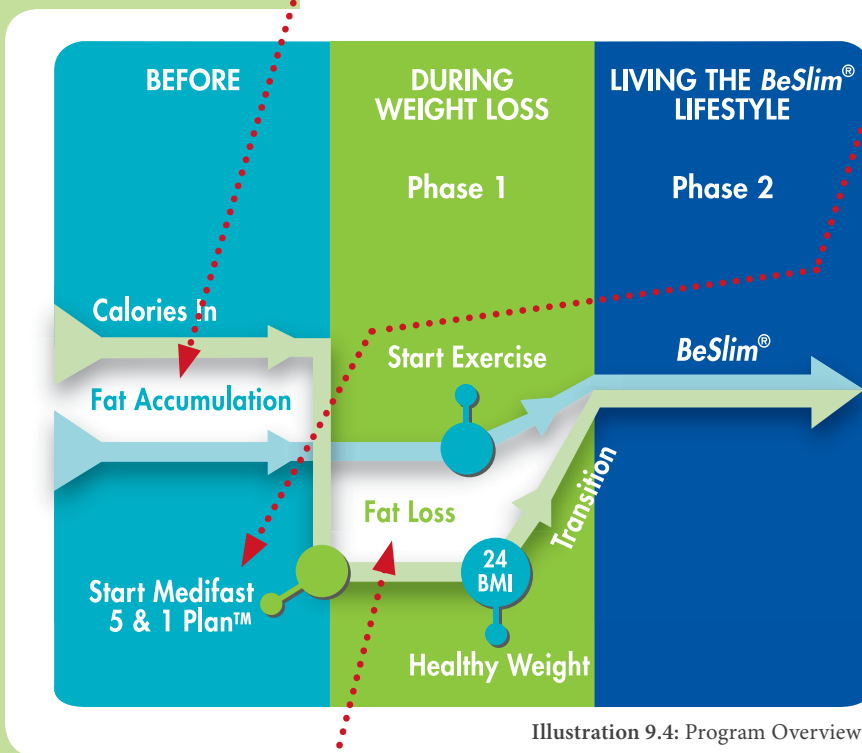


Illustration 9.4: Program Overview

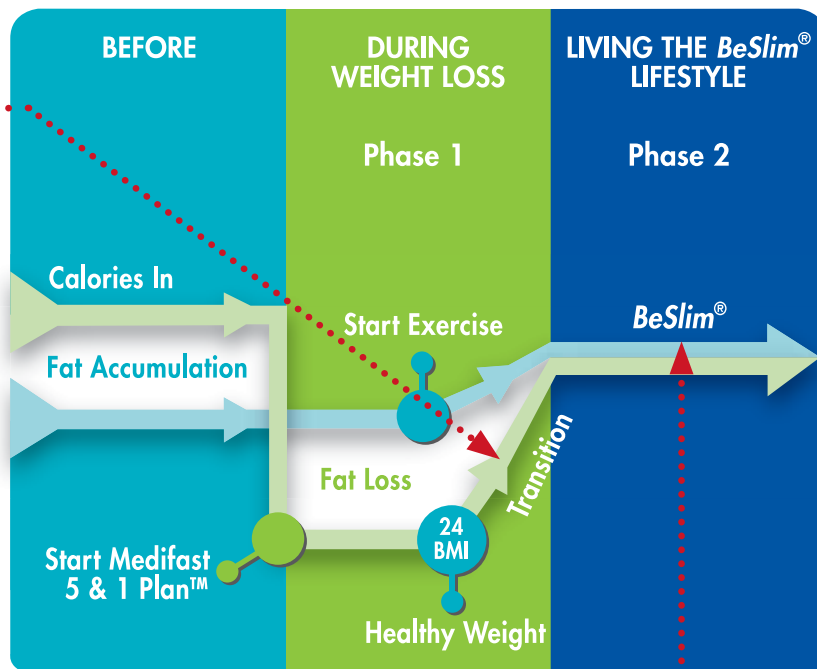
**Starting the Medifast® 5 & 1 Plan™**—When someone follows the protocols of the Medifast® 5 & 1 Plan™ in Phase 1, we drop their overall calories down to between 800 and 1,000 calories a day. This creates an energy deficit as the body needs more energy than this to function.

Faced with this need for more energy, within about three to five days the body will go into a “fat-burning state,” releasing energy that was stored in its fat cells.

Once in a fat-burning state, the average person loses up to 2 to 5 pounds per week (as long as they follow the specific protocols of the Medifast® 5 & 1 Plan™ and remain in a fat-burning state).

**Exercise**—If someone is not exercising prior to starting the program, we recommend that they don't begin exercise until after three weeks on the program, to give their body time to adjust to the lower calorie food intake. Too much exercise in the beginning could adversely affect someone's weight loss and could potentially be harmful. After about three weeks we gradually introduce exercise (it could begin as simply as a 20-minute walk three times a week). If someone is currently exercising, we ask them to decrease their exercise plan in half (intensity, time/duration, or frequency) during the first three weeks, then gradually work back up, as their body adjusts to the lower calorie food intake.

**Transition**—Once we get our Clients to a healthy weight (defined as a BMI below 25), we start the transition process by gradually adding more calories and introducing new food groups such as fruits. You will note that we are also gradually adding more exercise. Transition will last from eight weeks to 16 weeks, depending up on how much weight has been lost. All along you are working with your Client to make sure they are learning new Habits of Health behaviors.



**Phase 2**—Once a Client has moved through Transition, they should know and be practicing the BeSlim® lifestyle (use the BeSlim® Assessment to keep them on track). You will notice that at this point, their calories in equals their calories out. This is a point of equilibrium where a person will maintain weight for the rest of their lives.

Illustration 9.4: Program Overview

## Explaining the Program to a Potential Client

When explaining the Take Shape For Life® Program, your conversation flow outline should look like this:

1. The first segment is the presentation itself. This is the part explaining what Take Shape For Life® is, how it works, and your role as a Health Coach.
2. The second segment is profiling your Client to discover how much weight they want or need to lose, their motivation, and to determine if there is anything that would prevent them from going on the program.
3. The third segment is helping your Client select their food and place an order.

You will notice that between each segment is an arrow and the word *segue*. Segue means “to make a transition from one thing to another smoothly and without interruption.” It is the bridge in your conversation that moves you from section to section. As we go through this narrative you will learn two powerful segues that will move your conversation forward.

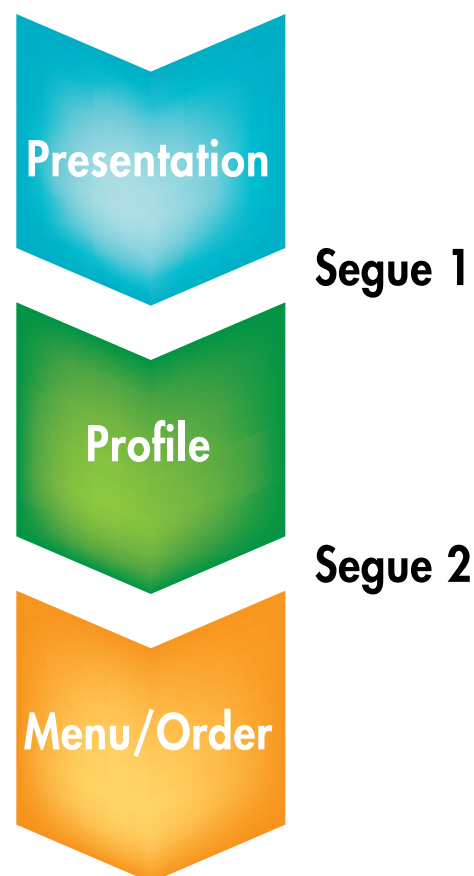


Illustration 9.5: Program Conversation Flow

## Presentation Talking Points

Later in this section, you will read a detailed narrative of a presentation. Don't be intimidated by its length and don't think that you need to know every detail of it. It is presented in the *Business Blueprint* for thoroughness so that you get a complete understanding of the program. You do not and will not need all of this information to enroll a Client. However, if you read it carefully, especially if you read it out loud, you will learn a tremendous amount about our program that may be useful later if you get specific questions.

When you make your first presentations—before you have it committed to memory—you may want to write your own bullet points to use when you are speaking to someone. This will keep you focused and on track as you move through your presentation. For example, the boxes below are the bullet points for the detailed the narrative that follows:

*"Let me give you a little background on our program..."*

- My role as a Health Coach
- Credibility of Medifast® (20,000 doctors/over one million people since 1980)
- Credibility of the products/programs
- Third-party validation (clinical studies)

*"Let me share what makes Take Shape For Life® unique..."*

- A comprehensive program, NOT a diet
- 2-phase approach: Safe, fast weight loss followed by a strategy to keep it off
- Medifast® 5 & 1 Plan™ (5 Medifast® Meals and 1 Lean & Green™ Meal)
- Easy to follow
- The food tastes good
- Eating every 2 to 3 hours
- Balanced blood sugars so you shouldn't feel hungry
- You can lose up to 2 to 5 pounds per week

*"Let me explain why the Take Shape For Life® Program works..."*

- The program creates a gap in the amount of calories (fuel) your body needs versus what your program will provide.
- In 3-5 days, you will be in the fat-burning state.
- After that, you'll experience an increase in energy and reduction in hunger.
- A nutritionally balanced program: 1) balanced protein and carbs, low fat 2) over 24 essential vitamins and minerals.
- Lean & Green™ Meal: 5 to 7 ounces of a lean protein source and 3 servings of non-starchy vegetables.
- Everything will be covered in the Quick Start Guide, so be sure to read it.
- Cost neutral—about \$11 a day.
- I will stay in touch with you regularly.
- You have access to our national support calls and the online support tool, Support in Motion.
- Take a "before" picture.
- Drink plenty of water.
- No alcohol.
- No extra carbohydrates or sugar.
- Exercise for the first 3 weeks: if you're already exercising, cut in half for a few weeks; if you aren't already exercising, wait a few weeks to start.

*"If you follow the protocols and let me coach you, we will get you to your optimal weight!"*

Now that you have the Presentation Talking Points, let's elaborate on them in a more detailed narrative. Remember, it is helpful to know the details of the presentation below, but it isn't necessary to cover all of these areas. Instead, just write down your talking points and present from them.

### **How to Learn a Presentation**

Read the script silently.

Read the script out loud.

Record yourself reading it.

Memorize one section at a time.

Make talking points and practice them often.

Implement your presentation immediately and frequently.

Highlight one phrase out of each talking point to jog your memory while you are speaking with a potential Client.

## Detailed Presentation Narrative

### ***“Let me give you a little background on our program...”***

I am a Certified Health Coach with a company called Take Shape For Life®. We are division of Medifast®. Are you familiar with Medifast®?

Medifast® is a 30+ year-old company listed on the New York Stock Exchange and has the reputation of being the premier nutritional solution for health and weight management.

Our program is both time-tested and proven with multiple clinical studies including a published study by researchers from The Johns Hopkins Bloomberg School of Public Health.

Medifast® produces safe, nutritionally balanced, soy- and whey-based, medically formulated, portion-controlled meal replacements—designed to help people safely and quickly reach their ideal weight.

These products are produced in an FDA-approved, state-of-the-art manufacturing facility and have been recommended by over 20,000 doctors and used by over one million people.

Until recently, a person could only get these products through physicians. However, with Take Shape For Life®, you can now take advantage of these products and programs—in the convenience of your home—with the assistance of a Health Coach like me.

Our approach is a 2-phase approach: 1) to help someone safely and quickly get down to a healthy weight and 2) to teach that individual the strategies to remain at a healthy weight for life.

My role as a Health Coach is to coach Clients through this process. I will provide the support and education to help you achieve success, and I will not charge you for it. The company pays me.

My goal will be to help you quickly and safely reduce your weight, transition you into maintenance, and teach you our BeSlim® lifestyle—the strategy that will teach you the Habits of Health for lifelong weight control and move you toward Optimal Health.

### ***“Let me explain what makes Take Shape For Life® unique...”***

It is important to understand that Medifast® manufactures the product and Take Shape For Life® delivers the program. *(Medifast® has different distribution channels and uniformly charges the same for its products across these channels. However, Take Shape For Life® is the only modality where someone gets a Health Coach for free. Consequently, it stands to reason that Clients utilizing the support of a Health Coach are more successful implementing the program and keeping the weight off long-term.)*

The company is physician-lead and the program and products are developed with specific medical protocols that are easy to follow. ***If you follow the protocols exactly the way they are written and if you let me coach you, we will get you to your ideal weight.***

We are NOT a diet. Diets by themselves rarely work long-term. In fact, 85 percent of people who lose weight on diets will gain it back within five years. We represent a clinically proven, comprehensive, nutritional approach along with lifestyle change. Our solution is a long-term one. I will be giving you a program to safely and quickly lose weight, and I will teach you how to keep it off for life!

On the 5 & 1 Plan™, you'll eat five portion-controlled Medifast® Meals every day (consisting of shakes, soups, oatmeal, chili, bars, pudding, to name a few), and one Lean & Green™ Meal consisting of lean protein (chicken, fish, lean beef) and non-starchy vegetables.

The program is easy to follow and the food tastes good.

After about three days your body will be in a fat-burning state. Once there, you shouldn't feel hungry and you can expect to lose weight.

On this program, people generally lose up to two to five pounds a week.

***“Let me explain why the program works...”***

As I mentioned, our Program has two phases. The first phase is to safely and quickly get you to your ideal weight. The second phase is to teach you the BeSlim® lifestyle, a proven set of six concepts that will help you keep your weight off and move you toward Optimal Health.

Our weight-loss program works because it creates a gap (or energy deficit) in the amount of calories your body needs versus the amount of calories this program provides.

Since your body needs energy to function, when it is faced with an inadequate supply of fuel, it will preferentially turn to its fat stores and burn them.

In essence, we are using a natural process that will change the source of energy your body uses from one that is primarily blood sugar/carbohydrate driven to one that burns fat.

It takes about three days to transition your body into a fat-burning state. During that period a small number of people on the program may experience one of four symptoms: slight tiredness, hunger, grouchiness, or mild headaches.

If you suffer from any of these, know that this mild discomfort is usually

only temporary and that it should go away after about three days. After about three days, you should start feeling an increase in energy and a reduction in hunger.

Since you will be eating every three hours, you will be balancing your blood sugar levels; therefore, you should not feel hungry. If you do get hungry you can always have another Medifast® Meal. It is important that you eat every two to three hours (don't go over four hours) and be sure to have five Medifast® Meals along with your one Lean & Green™ Meal every day. In other words, do not skip meals.

This is not a "high protein" diet. Instead, we provide you with adequate protein to sustain muscle mass—because lean muscle is what helps control metabolism, so it is important to retain all of the muscle you have.

The protein sources we use are from both soy (65 percent) and whey (35 percent). The soy we use is the highest quality available. It is water washed and highly bioavailable. Soy is important because it is a "complete" protein, meaning it supplies people with all eight of the essential amino acids used for protein synthesis that our body cannot manufacture on its own. It has also been shown that 25 grams of soy per day, as part of a diet low in saturated fat and cholesterol, may help reduce risk of heart disease.

We also provide you with other high quality nutrition your body needs. You will be getting at least 100 percent of the 24 essential vitamins and minerals. **You will be getting the nutritional equivalency of about 2,000 calories a day in less than 1,000 calories.**

For your one Lean & Green™ Meal, you can eat five to seven ounces (cooked weight) of lean protein from our approved list. An example of a lean protein source is chicken, turkey, fish, or a lean cut of beef. It should be baked, broiled, or grilled. The "green" portion consists of three servings of non-starchy vegetables from our approved list.

You will need to drink plenty of water—a minimum of 64 ounces per day. You cannot drink enough water!

Do not eat any extra carbohydrates! Just one slice of bread or piece of fruit can take you out of the fat-burning state and slow your weight loss, and it may take three to five days to return to the fat-burning state.

If you drink alcohol, you will need to stop while you are on the program. Alcohol is metabolized similarly to carbohydrates and if you drink, you will lose the benefits of being in the fat-burning state. Plus, people tend to eat more when they drink. Once you get to your ideal weight, you will be able to resume drinking in moderation.

If you do get hungry at any time, you can have one optional snack each day from our approved list. These include celery (three stalks), Medifast®

Crackers, Medifast® Soy Crisps, sugar-free Jello®, sugar-free Popsicle®, up to 3 pieces of sugar-free gum or mints, and pickle spears (two spears).

If you are not exercising right now, I am going to ask you not to exercise for the first three weeks while on the program. Exercise is an important component to long-term weight maintenance, so we will be introducing exercise to your program in about three weeks. If you currently exercise, I am going to ask you to cut it in half (intensity, duration, etc.) for the first three weeks. Since we are reducing your caloric intake, exercising too much early on can actually stress your body and cause you to lose weight slower—plus, you'll be tired. Once your body adjusts to the fat-burning state, we will gradually increase your exercise intensity.

When you order your food, you will get a Quick Start Guide that explains the 5 & 1 Plan™ in detail. It is critical to read it cover to cover. Additionally, when you get your food, I want you to call me on the day you are ready to get started so that I can review your plan and answer any questions.

The cost for Medifast® Meals is about \$11 per day. However, since you will be letting me be your grocer while you are on the program, the money you spend is literally cost-neutral because you will not be eating other food except your protein and vegetables in your Lean & Green™ Meal.

As you go on the program, I will be staying in touch with you on a regular basis to answer questions and support you. In addition, I will make our national support calls on Monday and Wednesday nights available to you as additional support from the nurses and physicians affiliated with Take Shape For Life®.

One other thing I am going to ask you to do is to take a "before" picture. I have a couple of reasons for asking you to do this. First, it will help to motivate you and, as you lose weight, you will be able to see your progress. Second, as you lose weight, people are going to notice how good you look and start asking questions. When they do, and if I've done my job right, you can decide to refer those people to me and I can coach them (I'll also give you discounts off your next order for referring them to me). Or perhaps at that time—who knows—you may want to consider becoming a Health Coach yourself and coach your friends to better health. If that happens, a compelling set of "before" and "after" pictures can be very valuable.

Your health is your most important asset. Medifast® and Take Shape For Life® have literally helped hundreds of thousands of people lose weight and get healthy. I am confident that if you let me coach you through the process, I can help you get to your optimal weight.

## What happens after you've given the presentation?

You've completed the first of three steps in your conversation with your potential Client. At this point you'll want to move to the second part of the process, profiling your Client. How do you move to that step? Using a segue is the easiest way to get you there.

### **Segue One:**

If you'd like, I can go ahead and ask you a few questions to see whether you are a candidate for this program. Would you like me to do that?

### **OR a variation of the above:**

If you'd like, I can go ahead and ask you a few questions to see if there is anything that would prevent you from doing this program. Would you like me to do that?

Using this phrase allows for a comfortable transition to the next step and flows naturally. You are simply asking permission to continue the dialogue. If your potential Client tells you to go ahead then you will begin to profile them using the "Client Tracking Sheet" contained in your File Folder System (to be discussed under Client Support later in this *Business Blueprint*). Along with Order Forms, you will always want to have Client Tracking Sheets on hand.

## 6

## Profiling Clients

Before you do a menu plan and take an order, you will need to profile every Client. This will enable you to discover what they want, where they are starting from, their motivation, and the level of coaching they will require. It also enables you to make sure that there are no issues that would prevent them from doing this program.

To profile a Client, you will need to use the Client Tracking Sheet (CTS) and fill it out completely. When profiling a Client, make sure you:

- Ask the important question first: "What do you want to achieve from this program?" This affords you the opportunity to find out about health conditions, any medicine they're currently using, and, ultimately, why Take Shape For Life® is something they desire. *Make sure to be attentive, listen carefully, and take good notes!*
- Recommend that they consult with their primary care or family physician before starting a weight-loss program.
- Explain that you will be asking them some personal questions as you profile them and, if they feel uncomfortable answering any of these questions, you can have them profiled by one of the support nurses instead.

### Take Shape For Life Client Tracking Sheet

Client name:	ID#	
Process date:	Self-adjust:	
User name:	Password:	
Address:		
City:	State:	Zip code:
Back time:	Time zone:	
Phone (work):	Phone (home):	
Email (work):	Email (home):	
Occupation:	Hours:	
Exercise:		
Frequency:	<input type="checkbox"/> Daily <input type="checkbox"/> 3-5 days/week <input type="checkbox"/> 1-2 days/week <input type="checkbox"/> Never	
Medications:		
Allergies: <input type="checkbox"/> None <input type="checkbox"/> Soy Other: _____		
How did you hear about Take Shape For Life? _____		
<b>WEIGHTLOSS GOALS</b>		
Current Weight: _____	Height: _____	BMI: _____
How much weight would you like to lose? _____ pounds		
Why do you want to lose weight? _____		
Which other weight-loss methods have you tried?		
Fastest	Result	
_____	_____	
For you personally, what is the most difficult thing about losing weight? _____		
Is your family aware that you're starting this program? <input type="checkbox"/> Yes <input type="checkbox"/> 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? _____		

Client Tracking Sheet  
(located in the Appendix)

- Tell them that as a Take Shape For Life® Health Coach, you are certified in how to build and customize a program to meet their weight-loss goals, but that you cannot diagnose or treat any medical conditions, or give any medical advice.
- Only give out information or answer questions you are knowledgeable about. If you don't know the answers to questions, or if certain medical conditions come up in the profile that are not covered in the protocol suggestions, be sure to talk to someone at Take Shape For Life® qualified to answer those questions.

When you use the CTS, speak in a conversational manner and not as if you are filling out a form. Be straightforward and matter-of-fact and get through the profile in an adequate but efficient amount of time.

The CTS enables you to conduct yourself in a logical and professional manner and helps you to present yourself as a consultant and not a “diet salesperson.” It shows your Client that you are knowledgeable, and it builds confidence in you as their Health Coach.

Remember that when you are coaching someone you need to be sensitive to the issues of being overweight, and to personal information. For example, when you are getting someone's personal information you may say something like this: *“Susan, if you don't mind, can you tell me how old you are?”* Or, *“Susan, do you mind telling me, how much you weigh? Don't be embarrassed about this as I deal with this issue all of time—it's what I do—and I've been where you are. The good news is that you are doing something about it, and I'm going to help you. But in order for me to help you, I need to get an idea of where we're starting from and where we're going.”*

Keep in mind that unless you are licensed medical practitioner you cannot take a medical history. However, if someone is taking medications it is important to tell them to work with their doctor as their dosages may need to be reduced or eliminated as they lose weight. To make sure there are no contraindications, one way to ask about someone's medications is to simply say, *“John, are there any medications you are taking that you'd like to tell me about?”*

## Client Profile Reference

You should use the Client Profile Reference as you profile your potential Client's current health.

We recommend that all Clients contact their physician or qualified medical practitioner before starting the Medifast® 5 & 1 Plan™, and stay in regular touch throughout their weight-loss progress. Your Client will want their doctor's supervision if any of the following absolute or relative contraindications apply to them.

*Note: All information collected with the Client Profile Reference cannot be stored electronically or shared, unless you are a HIPAA-compliant health care provider.*

**Absolute Contraindications**—If your Client has any of the following conditions, they may use Medifast® products as healthy supplements to enhance their diet, with their physician's approval. However, Clients with these conditions should not begin the Medifast® 5 & 1 Plan™ at this time.

- Heart Attack within previous 3 months (unless cleared by a cardiologist) or unstable angina
- Recent stroke and/or TIAs (mini-stroke)
- Clotting disorders
- Type 1 diabetes (can be used for improved nutrition or weight maintenance but is not recommended as a weight-loss program; can add Medifast® Meals to regular food intake)
- Severe liver disease (may require a lower protein diet)
- Severe kidney disease
- Active peptic ulcer disease
- Active cancers
- Eating disorder (e.g., anorexia nervosa, bulimia)
- Severe psychiatric disturbance (history of major depression and/or suicide attempts)
- Corticosteroid therapy >20 mg/day
- Chronic illicit drug usage, addictions, alcoholism, or substance abuse

**Relative Contraindications**—Certain conditions may necessitate close supervision by a physician. Your Client should check with their physician prior to starting the 5 & 1 Plan™, and at regular intervals during the weight-loss phase, if any of the following conditions apply:

- Use of the medication lithium—their physician may wish to monitor their lithium levels while on the program
- History of seizures—their physician may wish to monitor their seizure medication levels while on the program
- History of peptic ulcer disease (not active)
- Use of anticoagulant medication such as Coumadin (warfarin)—their physician should be aware that Medifast® Meals are fortified with vitamin K and that their daily intake of vitamin K will be consistent; their physician may wish to monitor their medication levels while on the program
- Over the age of 70—a higher calorie and/or protein level may be necessary, so we do not recommend the standard Medifast® 5 & 1 Plan™; refer to our

Senior Meal Plan (PDF) for helpful information about using Medifast® products in conjunction with a higher calorie diet

- Adolescent use (beyond puberty and under the age of 18)—any weight-loss program (such as Medifast®) should be used only as directed by their physician; refer to our Teen Meal Plan (PDF) for helpful information about using Medifast® products between 13 and 18 years of age

## After You've Profiled Your Potential Client

You've completed the second of the three segments of your conversation with your potential Client. At this point you'll want to move the last part of the process, creating a menu plan and taking your Client's order. How do you move to that step? Use the following segue:

Segue Two:

Well,\_\_\_\_\_, what we need to do next is to go ahead and create a menu plan for you, order your food, and get you started! Plus, I've got some great savings for new Clients! Do you want to go ahead and do that?

## 7 Creating a Meal Plan

Once you have profiled your Client, immediately help him or her design a meal plan that suits his or her lifestyle. You can customize a meal plan around your Client's preferences, or you can use one of the pre-packaged Variety Packages. Variety Packages have a broad assortment of some of the most popular Medifast® Meals so that Clients can try many different kinds of products. They come in 2-week and 4-week assortments.

We will cover the details of the BeSlim® Club and other promotions later in this section but first let's talk about what you'll need to do to help your Client with their menu planning.

## Taking the Order

As the Health Coach, make sure you assist your Clients in making the first order. Use the Take Shape For Life® Order Form to write it down. Go through the menu plan with your Clients and determine which products to order.

### Variety Package or Customize?

Should you customize an order for each Client or should you use one of the Variety Packages? This generally depends on the wishes of your Client. Clients will often begin

As a professional Health Coach, it is critical that you take the leadership with your Clients so they don't fall back on old concepts they have about "dieting." In order for you to help them, they need to listen to your advice.

For example, it is critical that all new Clients read the Quick Start Guide. If they don't, their chances for successful weight loss go down dramatically.

One way to get accountability from your Client is simply state:

*"John, you've told me that you are really serious about getting this weight off and I am going to do my best to help you in that process. But you have to do your part.*

*"In your Welcome Kit you will get a booklet called the Quick Start Guide. I need you to promise me that you will read it, cover to cover, before you start the program. Can you promise me you'll do that? Because, John, if you don't, your chances for success go way down.*

*"John, I want you to be successful with this and I don't want you wasting your money or my time ... so can I get an agreement from you that you will read the Quick Start Guide?"*

with Variety Packages and then, in subsequent months, customize their orders. Many Health Coaches in Take Shape For Life® sign up the majority of their new Clients with a 4-week Variety Package. Placing a Variety Package order takes the least amount of time and is a convenient way to give your Clients a wide sampling of products so they can see which ones they like best. Plus, these pre-packaged groupings are discounted above custom orders to give automatic savings to the Client.

Regardless of whether the order is a Variety Package or customized, it is recommended that you encourage your Client to order at least four weeks of food. When they do, they tend to have greater success on the program and they will also maximize their savings and reduce or eliminate shipping costs. In other words, it is more than twice as expensive to order two 2-week Variety Packages than one 4-week Variety Package. Plus, when you factor in shipping times, if someone orders a 2-week Variety Package, and starts the program, soon after they've gone into a fat-burning state, they will need to reorder more products so they don't run out of food.

If you customize an order, keep in mind that our products are complete meals and that they come seven packets to a box. ***Consequently, you will need 20 boxes of Medifast® Meals to provide enough food for four weeks/one month on the program.***

When customizing an order, here are some questions you can ask:

- When do you get up?
- What do you like to eat for breakfast?
- When do you usually eat lunch? Dinner?
- Do you travel a lot?
- Do you have access to a microwave at work?
- Do you entertain clients during the day or at night?
- Are you someone who snacks a lot?
- What flavors do you like?
- Do you like soup, chili, oatmeal, pudding, etc?

**With all new Clients tell them they will get a special Welcome Kit that includes a Fast Shaker Jar, a Quick Start Guide, a DVD, and instructions on getting started.**

## Special Offers for New and Existing Clients

Take Shape For Life® has several compelling promotions for both new and existing Clients that will give them significant savings on their orders. By far the best savings program for a new or existing Client is the BeSlim® Club. With the BeSlim® Club—our

preferred Client program—Clients automatically begin saving:

- 5% on their orders for months 1 to 3
- 8% on orders for months 4 to 6
- 12% for orders on month 7 and beyond

This program not only saves Clients money but also rewards them with points they can redeem for some great products. BeSlim® Club Clients also get free shipping on orders over \$200. New BeSlim® Club Clients will receive a free week of food if their first and second BeSlim® order is over \$250 after discounts! The best thing about the BeSlim® Club is that your Client will never run out of food because we'll ship it automatically every four weeks.

Besides the BeSlim® Club, there are other great offers for both new and existing Clients. "Additional Support Material for Client Acquisition" at the end of this section will cover those.

## Placing the First Order

Orders can be submitted online, called in to the Client Contact Center, or faxed in. Most Health Coaches like to help their Clients place the first order by either doing it for them or by showing them how to do it. This way, you are sure of being able to get your new Client his or her discounts, as well as making sure that everything goes well.

**Ordering Online**—Most Health Coaches place orders online because it's fast and easy. When you place a new Client's first order online, register your Client and place the order on your co-branded Web site. This way, your information—Health Coach ID number, etc.—that links your Client to you is automatically populated on the order. (If you don't know how to order online, have your Business Coach show you so that you can become proficient placing orders this way.)

**Using the Client Contact Center**—When calling in an order and registering a new Client, be sure you have all of the information necessary to place the order and to give you credit.

Regardless of the method you use to place an order, if you are placing orders for Clients and taking financial information from them such as credit card numbers, be careful to completely destroy that information after you take an order.

***With all orders, be sure to write down their user name and password and batch date on the Client Tracking Sheet!***

### User Names and Passwords

You'll be creating a user name and password for your Clients both for ordering from Take Shape For Life® and for Support in Motion.

Make it simple, be consistent and make it the same for both. Here's an easy suggestion:

**User Name** = Client's email address

**Password** = welcome

After you develop your customizable welcome email, create a "masters" folder in your Outlook so that every time you have a new Client you can go to that masters folder and modify the original email.

**It's very important to provide your Client with their personal user name & password on the welcome email.**

In some cases Health Coaches may want to get a Client on a three-way call to the Client Contact Center to place their first order. If you do this, please follow the guidelines below.

*Guidelines on three-way calling to the company:*

1. It is your job to profile the Client beforehand and to have the order ready. It is not the job of the Call Center Representative to do this for you. You want to be as efficient with everyone's time as possible.
2. Make sure your Client knows they will need a credit card to place the order.
3. Be polite and courteous when making the call. When you get the Call Center Representative on the line, tell them, "Hello, \_\_\_\_\_, this is \_\_\_\_\_. I am a Health Coach and I have a new Client, \_\_\_\_\_, on the line with me who I'd like to register and place their first order.
4. Make sure you tell your new Client to write down his or her new Client ID number, password, and the order number.
5. Keep side conversation to a minimum to avoid confusion.

## After You've Taken Your New Client's First Order

When you get off the phone with the company, tell your new Client how excited you are for them and start to manage their expectations.

- Congratulate your Client on making this decision.
- Tell them that you are excited to be working with them.
- Tell them that they're going to love the program and they'll start seeing and feeling the positive results from it in no time.
- Tell your Client that you will be there for them every step of the way.
- Tell your Client to call you when the products arrive and also when they are ready to start the program.
- Remind your Client to take a "before" picture.
- Invite your new Client to be on the next support calls—even before their products arrive.

**Sign up your new Clients for Support in Motion.** This is a terrific online support tool that you can offer to your Clients for additional support were they can chart their progress, use a meal planner, blog with other members, get some great recipes, and get all kinds of healthy tips. To find it, just instruct your Clients to go to your co-branded Web site and click on "Support" on the home page, then click on the link to Support in Motion, watch the tutorial, and log on. They can also find it by going to [www.TSFLSupportInMotion.com](http://www.TSFLSupportInMotion.com). When you sign up your Client, simply use the same user name and password they will be using to order online from your Web site.

# 9

## Following Through: After the Order is Placed

Congratulations on acquiring a new Client and placing that person's first order! Most likely the single biggest amount of time you will ever spend in one setting with this Client just occurred. However, what's ahead is where your value will truly begin for that individual. It is the on-going coaching, in short snippets of time, over the ensuing weeks to come where you can truly make the difference in this person's life. So what do you do next?

As soon as possible, send out a "welcome email" and/or a "Welcome Kit." Samples of a welcome letter/email and attachments or materials were covered earlier in this section under "Be Prepared." But as a review, they might look as follows:

### The New Client Welcome Email:

- Personalized "welcome" email from you
- Attach the following:
  - PDF of the Quick Start Guide
  - BMI chart
  - The Medifast® 5 & 1 Plan™ Information Sheet
  - Do's and Don'ts
  - Your helpful tips

### Contents of New Client Welcome Kit (note that this is **not** the Welcome Kit that Take Shape For Life® sends with the first Client order):

- White Take Shape For Life® folder
- Your business card
- Personalized welcome letter from you
- *Achieving Optimal Health* DVD
- *It's Not Your Fault* CD
- Quick Start Guide
- Do's and Don'ts
- Medifast® 5 & 1 Plan™ Information Sheet
- BMI chart
- Product Catalog
- Referral pad
- BeSlim® Assessment

***Make a note to call your Client in three days!***

Let your Clients know what's coming next:

It is important to realize that most Clients have never had a Health Coach, so it is best to manage their expectations.

### Tell them to:

1. Read the Quick Start Guide before their order arrives.
2. Watch "Virtual Judy" on your Web site and/or watch the *Achieving Optimal Health* DVD.
3. Make a list of 5-20 reasons why they want to lose weight and get healthy.

### Also, make sure you:

4. Provide your contact information.
5. Explain how you will be working with them in the first week to ensure their success:
  - A short phone conversation on the day before they start
  - A short conversation with them days 1-4
6. Determine the level of support they want from you:
  - Standard support
  - Cheerleader
  - Drill sergeant
  - Virtual

Place your Client Tracking Sheet in Folder #1. Using the File Folder System will be discussed later in detail. In a few days your Client will receive their order and you will begin coaching them to 1) lose weight and 2) start on the path toward long-term Optimal Health!

## Additional Support Material for Client Acquisition

### Common Objections and Best Answers During and After a Presentation

1. ***“This sounds expensive. I’m not sure I can afford it.”***

I understand where you’re coming from. You know, when I first heard about this program I was thinking the same thing until someone pointed out that the program is actually cost-neutral. In other words, since you are eating five Medifast® Meals per day, you will not be spending money on other food. Think about it, you will be only investing about \$11 a day to get healthy.

Also, if you’re taking vitamins now, you won’t need to do that while you’re on this program since you’ll be getting complete nutrition—including 24 essential vitamins and minerals—from the Medifast® Meals you’ll be eating. Plus, if you are on medications for high blood pressure, cholesterol, or diabetes, there’s a very good chance that as you get healthy with this program, you’ll be able to either reduce or go off them completely with your doctor’s supervision. This can save you considerable money!

To get you started, we have some attractive options for you to get great discounts. I think it is best for you to start with a month’s supply of food but, if you need to, you can order every two weeks to stagger the payments. We also have some nice incentives for you to get additional discounts on your orders. When you refer anyone to me, you will get a \$\_\_\_ referral credit on your next order. Or, if you would like to hold a Tasting at your home where you invite some friends over, I’ll explain the program and you and your guests will receive some very nice discounts if they order. In fact, if you invite enough guests and they become Clients, you may earn enough in discounts to pay for a month’s supply of food!

2. ***“Isn’t it dangerous to your health to lower your calorie intake this much?”***

I have heard that before, and you are right to be concerned. If you lower your calories and don’t eat foods with balanced nutrition like many

Americans, you increase the chances of harming your body. Your body will sense “starvation,” look for additional energy sources, and burn muscle, which is something that is very unhealthy!

Medifast® considered this when it designed its low-calorie program. Our products are formulated to give you all the nutrition your body needs to sustain itself and help you reach Optimal Health! This special formula will kick you into a fat-burning state and, by consuming our high quality and complete protein meals throughout the day, you will protect yourself from muscle loss.

3. ***“I don’t know if I can go without fruit!” Or, “I don’t know if I can go without pasta, rice, bread, sweets ... etc.”***

I understand what you are saying because I felt the same way. I love fruit (bread, sweets, etc.). But what I found is that after about a week of eating these highly nutritious foods, my cravings for fruit (bread, sweets, etc.) just vanished. I was amazed! There are enough varieties of foods on this program to cover just about any taste you may be craving.

In addition, once you see the results from sticking with the program, I think you will find it easy to stay away from high-carbohydrate foods during your weight-loss period. Remember, you will not be on the Medifast® 5 & 1 Plan™ forever. We will transition you back to all the food groups once you have reached your goal weight!

4. ***“I love food too much to go without it.”***

That is terrific! Then you will love the Take Shape For Life® Program because you will be eating tasty and healthy foods all throughout your day!

The program makes this easy because you get to choose from a wide variety of Medifast® Meals to enjoy throughout your busy day. Plus, you also get to eat one non-Medifast® Lean & Green™ Meal once a day. Like you, I wondered if I could do it ... but it is so easy to follow and the results makes it all worthwhile!

5. ***“I have failed at every diet I’ve ever tried; what makes this so different?”***

Well, first, Take Shape For Life® is not a diet! It’s an orientation that will help you create health! You are starting a journey to learn new and healthy ways to lose weight, and more important, keep it off! What separates this program from many of the “fad diets” is that Medifast® has been around since 1980. It is one of the ONLY weight-loss programs that has clinical studies showing it to be a safe and effective way to lose weight and it's the **only** one that can say it's been recommended by over 20,000 doctors. This is no fad! I will be here to guide you with your plan and progress, making

sure of your success. What I need from you is a positive attitude and outlook—you CAN do this! I know it!

Plus, as you lose weight I am going to teach you our BeSlim® lifestyle and proven Habits of Health that will help you stay at a healthy weight.

6. ***“Since I’m only used to eating a few meals a day, I’m not sure if I can eat this many meals in a day.”***

If you are as busy as I am, you probably are not used to eating so often and it seems like a lot of trouble. But it is so easy to do! The foods are prepackaged, easy to take with you, and easy to mix—all you need is hot or cold water depending on your food choice, or you can eat our delicious Bars, Pretzel Sticks, Cheese Puffs, or Ready-to-Drink Shakes! In addition, you’ll feel so great throughout the day while on the program that you will make it a point never to miss a meal!

7. ***“I don’t like drinking water.”***

Water is necessary for all your body systems to function properly. In fact, drinking plenty of water is a Habit of Health. Everyone should drink at least eight glasses of water a day. Your water can come in a variety of sources such as unsweetened hot or iced tea, Crystal Light®, or any other low-calorie or calorie-free beverage. The best source however, is pure water. I will teach you to make sure you get enough water every day.

8. ***“I heard liquid diets are dangerous.”***

Some liquid diets in the past may have gotten a bad name because they didn’t contain all of the nutrition a person needed; therefore, they were incomplete. I can assure you that this program does not fall into that category! Take Shape For Life® is neither a liquid diet nor a fasting diet. We make sure that you will get all the required protein, carbohydrates, fiber, vitamins, and minerals you need to be healthy while on this program. Plus, you will be choosing from a variety of foods you can enjoy throughout your day.

9. ***“Can I just order one week to give it a try?”***

You can, but I highly recommend that you make a commitment for one month. The average weight loss in the first month is up to 10 to 20 pounds. By the end of one month, I know you will see the fast results and feel great! If you only order a week or two, you might run out of meals before your next order arrives and I don’t want that to happen to you. Plus, you save on shipping and handling and, if you sign up for the BeSlim® Club, you can continue to save quite a bit of money on your program.

10. ***“I can’t give up my exercise routine.”***

I am not asking you to give up your exercise routine. You will just need to cut back to 50 percent during the first few weeks to allow your body to get used to burning fat for energy. Remember, you normally burn carbohydrates, and you must let your body adjust. What is exciting is that you will see faster results with your workouts in the end! Believe me, it is worth it!

11. ***“I can’t control my cravings.”***

Oh, I think you will be pleasantly surprised to find that most of your cravings disappear soon after you begin the Take Shape For Life® Program. I was craving all the wrong foods before I found Medifast®, and it was amazing how my cravings just disappeared. I guess when you put the proper nutrition into your body, it doesn’t want junk anymore! In addition, as your Health Coach, I am here to help you cope. I have many helpful hints to help you succeed and beat those cravings when they arise! These strategies will help you throughout your life!

## Understanding Available Promotions

*(This and more information on Promotions can be found in the Library of Office in Motion.)*

### Promotions for **NEW** Clients

Health Coaches have three available promotions to entice potential Clients to get on the program and place an initial order.

**Offer #1: BeSlim® Club & Rewards Program Membership—Best Value!**

- No coupon code is necessary.
- In order to redeem, your Client must select “Make this a BeSlim® Order” in the Shopping Cart during Checkout.
- You can be a member of the BeSlim® Club for as long as you desire, but savings increase with length of membership.

As a member of the BeSlim® Club, a Client will receive savings and Rewards Points on every BeSlim® Club order, according to the following schedule:

**First BeSlim® Club Order** *(can be the initial order)*

- Free week of Medifast® Meals\*
- The Secret Is Out—Our book authored by the Medifast® Medical Group to provide information about our products and program and tips for success\*

- Free shipping\*\*
- 5% discount on the order total, after other discounts/coupons are applied
- Rewards Points—Can be accumulated and redeemed for healthy rewards, including exercise equipment and apparel

**TOTAL SAVINGS: \$114.95** (*minimum*)

\*BeSlim® Club order MUST be over \$250 after coupons and discounts to receive the free book and the free week of Medifast® Meals. \*\*BeSlim® Club order MUST be over \$225 after coupons and discounts to receive free shipping.

### **Second BeSlim® Club order**

- Free week of Medifast® Meals\*
- Free shipping\*\*
- 5% discount
- Rewards Points

**TOTAL SAVINGS: \$95** (*minimum*)

\*BeSlim® Club order MUST be over \$250 after coupons and discounts to receive the free book and the free week of Medifast® Meals. \*\*BeSlim® Club order MUST be over \$225 after coupons and discounts to receive free shipping.

### **Third BeSlim® Club order** (*savings vary on order size*)

- Free shipping\*
- 5% discount
- Rewards Points
- Bonus Rewards Points

\*BeSlim® Club order MUST be over \$225 after coupons and discounts to receive free shipping.

### **Subsequent BeSlim® Club orders** (*savings vary depending on order size*)

- Orders 4–6: 8% discount
- Order 7+: 12% discount
- Rewards Points
- Bonus Rewards Points (*month 6, 9, 12, etc.*)
- Free shipping\*

\*BeSlim® Club order MUST be over \$225 after coupons and discounts to receive free shipping.

### **Offer #2: 50OFF—\$50 off an order of \$275 or more\***

- 50% off shipping charges on all non-BeSlim® Club orders over \$275 after coupons and discounts are applied.
- This is a less-advantageous offer than the BeSlim® Club. With this offer, the Client is only saving \$45 (because they have to pay for shipping).

- To redeem this offer, a Client must enter the code 50OFF in the Shopping Cart during Checkout.
- This offer cannot be used in conjunction with the BeSlim® Club or any other offer.
- This offer can only be used on an initial order.

**TOTAL SAVINGS: \$45** (*because of shipping charges*)

With the BeSlim® Club, the Client will be saving at least \$114.95 on the first order ONLY.

### **Offer #3: 25OFF—\$25 off an order of \$150 or more**

- This is a less-advantageous offer than the BeSlim® Club. With this offer, the Client is only saving \$15 (because they have to pay for shipping).
- To redeem this offer, a Client must enter the code 25OFF in the Shopping Cart during Checkout.
- This offer cannot be used in conjunction with the BeSlim® Club or any other offer.
- This offer can only be used on an initial order.

**TOTAL SAVINGS: \$15** (*because of shipping charges*)

With the BeSlim® Club, the Client will be saving at least \$114.95 on the first order ONLY.

## Current Promotions for *EXISTING* Clients

### **Offer #1: BeSlim® Club & Rewards Program**

As our focus is on helping people keep the weight off and stay healthy for life, all Clients should be encouraged to enroll in the BeSlim® Club. Not only will they receive additional savings on their favorite Medifast® Meals, but also they will receive Rewards Points for each BeSlim® Club order. See above for details.

### **Offer #2: 55OFF—\$55 off an order of \$255 or more**

- This is a less-advantageous offer than the BeSlim® Club. With this offer, the Client is only saving \$20 (because they have to pay for shipping).
- To redeem this offer, a Client must enter the code 55OFF in the Shopping Cart during Checkout.
- This offer cannot be used in conjunction with the BeSlim® Club or any other offer.
- This offer can only be used on a subsequent order (not for new Clients).
- One time use ONLY.

**TOTAL SAVINGS: \$45** (*because of shipping charges*)

With the BeSlim® Club, the Client will be saving at least \$95 on the second order ONLY.

**Offer #3: 30OFF—\$30 off an order of \$200 or more**

- This is a less-advantageous offer than the BeSlim® Club. With this offer, the Client is only saving \$20 (because they have to pay for shipping).
- To redeem this offer, a Client must enter the code 30OFF in the Shopping Cart during Checkout.
- This offer cannot be used in conjunction with the BeSlim® Club or any other offer.
- This offer can only be used on a subsequent order (not for new Clients).
- One time use ONLY.

**TOTAL SAVINGS: \$20** (*because of shipping charges*)

With the BeSlim® Club, the Client will be saving at least \$95 on the second order ONLY.