the NUTRITIOUS LIFE studio

Webinar 10 Handout:

STEP-BY-STEP CHECKLIST FOR YOUR FIRST SESSION

This handout serves as your step-by-step guide for what to do in your first session with a new client. While the skeleton intake form is a tried and true formula for making sure you get the information you need to build a meal plan and establish a foundation for the work you will do, there is tons of room in your first session to build rapport and showcase your personality and approach. Making a connection and building a foundation of trust and openness are the most important things in building client relationships. Make sure you are overly familiar with this checklist so you are comfortable with the flow and the process comes naturally.

Checklist for success

Before the first session….

Making contact. Potential clients are EVERYWHERE! Put yourself out there and share your business card and contact information with anyone and everyone who you think may be a referral source for you. Offer to give short workshops or inservices in places where you might find potential clients, such as gyms, schools, healthy eateries and community organizations. Once you have potential clients on the phone or in person, find out a little about the work they are interested in doing and give them a few minutes of your time to show that you are a good listener. After a potential client has shared his or her needs, discuss how you will work with the person to meet his or her goals. Specifically cover:

- **Breakdown of sessions.** Let the potential client know that in the first session you will do a comprehensive intake and ask a lot of questions so that you can customize a meal plan and approach to meet the established goals (use the words and goals that were shared with you!). Let the person know the first session will take an hour. Be clear that in the second session you will provide deliverables, which include a meal plan, shopping list, food journal, behavioral approach, etc... This session will also last an hour. Discuss that follow ups after these first two sessions last 30 minutes and will be used to refine the meal plan, provide support and accountability and incorporate and improve upon the other pillars of a Nutritious Life including sleep and managing stress.

- **What to expect.** Be clear about what your follow up sessions will include, which may be everything and anything from your client being weighed (this is not mandatory), your assistance in short term goals and planning, nutrition education, continued support and accountability with suggestions to keep your client on track etc etc...

- **Your availability.** Establish your availability in the design of your business and communicate this with your client. Also, giving specifics about your availability will make it easier for your client to commit a specific time to see you.

- **How you work.** For example, you are willing to pull up menus and recipes to help them reach their goals and strategize for hurdles that may come their way. Be creative and come up with unique tricks and tips that you do for your clients. Be up front about what you are willing and able to offer.

- **Make an appointment.** Get it on the books! Then, email the new client a confirmation. I suggest scheduling all follow ups if possible so there is no need to spend time scheduling future appointments. Be clear about your rescheduling and cancellation policies at the beginning.

In the first session….

Greet your client. Be prompt for your appointment (as much as humanly possible). Smile and offer a warm welcome. Offer a cup of tea or water. Remember to present yourself professionally and have your intake forms ready to go. If you meet with clients in an office, keep your workspace clutter free and clean. It is helpful to have a clock positioned someplace behind where your client is sitting or in a location that is easy to glance at without appearing like you are checking the clock often. You'll need the clock to keep you on time! Silence your phone and make sure your environment is a confidential one. You should have a door that closes so that others cannot overhear what goes on inside. If you meet your clients outside of an office (say, in a local coffee shop) be familiar with the setting and make sure your clients are comfortable meeting you there. If you meet clients in their homes, be respectful of their house rules (shoes off? No problem). Unless your work requires you to be in the client's home (kitchen makeovers, cooking lessons, etc.) I recommend meeting in a place where you as the practitioner have control of the environment. In these situations it's best to wear a watch so you don't need to consult your phone for time keeping.

Introduce the intake form. Tell your client that you will be asking a lot of questions today to really understand who she is. Remind your client that it will take about an hour. Let her know that you will send her home with some "homework" and that you'll use the time between appointments to take the information from the intake form to customize her plan, which you'll present at your second/next appointment.

Note: *One of the most challenging parts of the intake is gauging your client and sticking to your one hour appointment time.*

Conclude your session. Tell your client why you are excited to work with her. Choose a few things that she is already doing really well and praise her for them. Go over the things that strike you as relevant. For example, "It sounds like you enjoy healthful foods -- I'm going to work on the portions and proportions to help improve your energy." Give a few reasons why you are confident she will be successful working with you. Give a couple manageable and measurable goals: go from 3 to 2 cups of coffee per day; get in water with every meal; keep a food journal, etc.