




# NUTRITION<sup>TM</sup> FACTORS

## Getting Started Guide

*Updated: January 6, 2020*





**“Three things in life –  
your health, your mission, and  
the people you love. That’s it.”**

**- Naval Ravikant**

Being in the service of others is the greatest experience and gift one can contribute to society. Not only do you gain lifelong friendships, you will find joy in helping others make positive changes towards obtaining their best life. There are many people waiting for your expertise and services.

This guide has been designed to get you started in your Nutrition Factors business. Dedicate the next few days to immersing yourself in the Coaching Portal and becoming familiar with the new tools now at your fingertips.

You are now a part of an extensive community of healthcare and wellness providers. Take advantage of all our valuable resources to maximize your coaching potential. Nutrition Factors will support you every step of the way.

We look forward to sharing this experience with you.

A handwritten signature in black ink, appearing to read "Janet Jackson". The signature is fluid and cursive, with the first name "Janet" and last name "Jackson" clearly distinguishable.

Janet Jackson MLS, RDN  
CEO & Founder

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**Dedicate the next few days to  
immersing yourself in  
Nutrition Factors.**

# Welcome

Congratulations on joining Nutrition Factors!

You are now a part of an ever-growing community of nutrition, fitness, and wellness professionals dedicated to elevating global health and wellness. This Getting Started Guide is designed to take you through your first 30 days to help you launch a successful Nutrition Factors business.

## ■ *Meet Nutrition Factors*

Familiarize yourself with Nutrition Factors, the company overview, and products.

## ■ *Contact and Support*

Know how to contact Nutrition Factors for Coach Support.

## ■ *Future of Healthcare*

Healthcare as we know it is changing and moving to an online structure through telehealth.

# Meet Nutrition Factors

## *Company Overview*

Nutrition Factors is a HIPPA compliant nutrition, fitness, and wellness platform that provides Dietitians, Nutritionists, Health Coaches, Fitness Trainers, Holistic and Wellness Providers the tools to personalize a Client's wellness experience and manage their coaching business.

## *Services and Features:*

### **Nutrition and Meal Planning**

- 7 Day GRID Meal Planner
- Database of Prepared Meal Plans
- Recipe Database
- Meal Prep Guide
- Shopping List and Grocer Links

### **Coaching Management Tools**

- HIPPA Compliant Telehealth Webportal
- Guided Assessments & Coaching Forms
- Instant Billing
- Client Scheduling

### **Learning Library**

- Nutrition Factors Library
- Coach Resource Library
- Classes and Courses
- Weekly Webinars

### **NF Grid Gym Fitness App**

- Online Coaching for Individualized Workout Plans
- Virtual Personal Trainer w/ over 4000 Exercises
- Activity Tracker
- Body Composition Monitor

### **Connect-a-Coach**

- Coach referred NF Clients
- 30-min Weekly Coaching Sessions
- Earn Commissions by Coaching Nutrition Factors Clients

### **Professional Trainings and Certifications**

- Health Coach Certification
- CDC Diabetes Prevention Program [DPP]



# Contact and Support



## ***Headquarters***

1915 South 4800 West  
Salt Lake City, Utah



## ***Website***

[nutritionfactors.com](http://nutritionfactors.com)




## ***Phone Support***

385-394-3938



## ***Email Support***

[manager@nutritionfactors.com](mailto:manager@nutritionfactors.com)



**“The number of patients using  
[telehealth] services will  
increase to 7 million in 2018,  
up from less than  
350,000 in 2013.”**

# The Future of Healthcare

The “perfect storm” has arrived in healthcare as digital technologies and online platforms emerge. The arrival of online high-tech healthcare shows **exponential growth**, and the best part is, online telehealth and telewellness are still in their infancy.

Healthcare as we know it is changing and moving to an online structure through telehealth. No more traveling across town and waiting in the doctor’s office for hours for your appointment. Online telehealth is fast becoming the new way to video chat with a physician or health coach for minor health and nutrition concerns from the privacy of your own home or while on-the-go.

Healthcare in the United States is undergoing a rapid change that aims to improve care coordination, provide new service models, and expand access to care. As a result of health

care reform, telehealth has emerged as an alternative mode of health care delivery.

Telehealth encompasses a broad variety of technologies and tactics to deliver virtual medical, health, and education services. Telehealth is not a specific service, but rather a collection of means to enhance care and education delivery.

Nutrition Factors has positioned itself to become a pioneer and leader in the online nutrition and wellness counseling sector. The Nutrition Factors Coaching Portal provides innovative features that enhances care, promotes good health, reduces obesity and targets human food desires with pleasing visuals and simple explanations along with personalized one-on-one health coaching, menu and workout planning.

## **Demand Among Millennials:**

**60% of millennials support the use of telehealth to replace in-office visits. with a population of 83 million, millennials now comprise the largest segment of today's workforce.**



**“The secret to getting ahead  
is getting started”**

**- Mark Twain**

# Getting Started

Use these guides and worksheets to jumpstart your business.

- ***First 72 Hours Checklist***

Set the tone early and get started right. Check-off these simple steps to set yourself up for success.

- ***Quick Start Guide***

Use this guide as a worksheet to help you get started with Nutrition Factors. Print off and write directly on the sheets.

- ***10 Ways to Dive into Nutrition Factors***

Ten steps designed to help you take action, stay motivated, and make Nutrition Factors an important part of your business.

- ***Resource Library***

Find support materials, trainings, and recorded webinars within the Nutrition Factors Resource Library.

# First 72 Hours Checklist

Set the tone early and get started right. Check-off these simple steps to set yourself up for success.

## ***Within 24 hours of Enrollment***

- Schedule a meeting with your referring coach to discuss the *Quick Start Guide*
- Log in and explore your Coaching Portal
- Join the Nutrition Factors Coaches Only Group on Facebook
- Like and follow Nutrition Factors on Facebook and @nutritionfactors on Instagram
- Activate the following accounts via the sent emails
  - GRID Gym App
  - Telehealth Webportal [doxy.me]
  - Billing & EHR Service [Office Ally]
- Set up your Coaching Profile
- Set up your Schedule Link with Calendly

## ***Within 72 hours of Enrollment***

- Get comfortable with these key features:
  - 7 Day GRID Meal Planner / Create a Recipe / Coaching GRIDs
  - GRID Gym App
  - Telehealth Webportal
  - Billing Link
  - Schedule Link
- Visit [partners.nutritionfactors.com/resources](https://partners.nutritionfactors.com/resources) library
- Review the Affiliate Program

## ***Start Coaching and Build your Team***

- Enroll your first client
- Create and add your first recipe into the Recipe Database
- Create your first meal plan
- Create your first workout plan
- Share Nutrition Factors with other coaches

# Quick Start Guide

## *Getting started with Nutrition Factors*

### 1 Get Connected

Referring Coach: \_\_\_\_\_ Phone #: \_\_\_\_\_

NF Coach Support: *manager@nutritionfactors.com*

NF Coaches Only Group: *facebook.com/groups/524545878356460/*

*Schedule a meeting with your Mentor.*

### 2 Set up your Coaching Portal

Follow the steps found within the *Setting up your Coaching Portal* section of the *New Coach Getting Started Guide* for extended instructions on how to set up your Portal.

Coach Username: \_\_\_\_\_ Affiliate ID: \_\_\_\_\_

Nutrition Factors Link: *nutritionfactors.com/coach/* \_\_\_\_\_

Telehealth Link: *nutritionfactors.doxy.me/* \_\_\_\_\_

Billing Link: *officeally.com*

Schedule Link: \_\_\_\_\_

### 3 Immerse yourself in Nutrition Factors

Use the Coaching Portal every day. Dedicate time to learn the platform through hands-on practice, trainings within the Resource Library, and weekly live webinars. Join us each Tuesday at 2:00 pm for our weekly Coaches Meeting and each Wednesday at 7:00 pm for our weekly Nutrition Factors Overview Webinar for new or prospecting coaches .

Resource Library: *partners.nutritionfactors.com/resource-library*

## 4 Plan your Schedule

Use a calendar to highlight dates that you will work on your business. Set aside time to identify new clients, coaches, and network with businesses. Begin booking Client Sessions and Health Fairs right away.

### When do you plan to work?

I will work \_\_\_\_\_ hours a [day/week] on my coaching business.

### Define your Activity

I will complete the following activities each [day/week]:

[Ex. two new contacts a week, one social post/ day, etc.]

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■ These activities will help me:

[Ex. build my business, increase my confidence, etc.]

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### Identify Obstacles

I foresee the following obstacles:

[Ex. life, kids getting sick, other priorities, etc.]

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■ I plan to overcome these obstacles by:

[Ex. setting a schedule, staying positive, etc.]

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## 5 Set Specific Goals

Successful Coaches use goals to hold themselves accountable to their action plans. Connect your goals to key activities to prioritize the activities that drive results. Review your goals frequently to track your progress.

### Your Goals

Each month I want to make: \$ \_\_\_\_\_

Goals	Month One	Month Two	Month Three
New Leads [Ex. received new contacts from health fair]			
New Clients [Ex. enrolled new client for Meal Prep]			
Coaching Sessions [Ex. continuous coaching session for workout plan]			
Coach Referrals [Ex. referred new Health Coach to Nutrition Factors]			



## 6 Define your Coaching Program

What do you want your Coaching Business to look like? Begin to detail your vision.

### Define your Focus

What is your specialty? \_\_\_\_\_  
(Ex. nutrition, fitness, etc.)

### Define your Program

Personal Coaching Fees: \$ \_\_\_\_\_

Length of Program: \_\_\_\_\_

Length of Session: \_\_\_\_\_

### Outline your Coaching Program

What services to you plan to offer?  
(Ex. meal planning, workout plans, etc.)

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## 7 Find Clients to Coach

Creating a steady stream of leads and prospects is vital to the health of your coaching business. How are you going to attract and secure clients? Develop a list of potential strategies and channels that you plan to use:

(Ex. tap into your network, make real life contacts, give talks at local businesses and gyms, free coaching sessions, social challenges)

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## 8 Start Coaching

Define your Coaching workflow. Personalize your coaching sessions to meet your client's needs. Use the checklist below as a guide.

### *Preparation and Paperwork*

- Sign Client/Coach Agreement
- Define Relationship and Responsibilities
- Gauge Commitment Level and Readiness

### *Health Assessment*

- Health Assessment and Discovery
- Document allergies, food intolerance, health or health risk problems, limitations, weaknesses and strengths

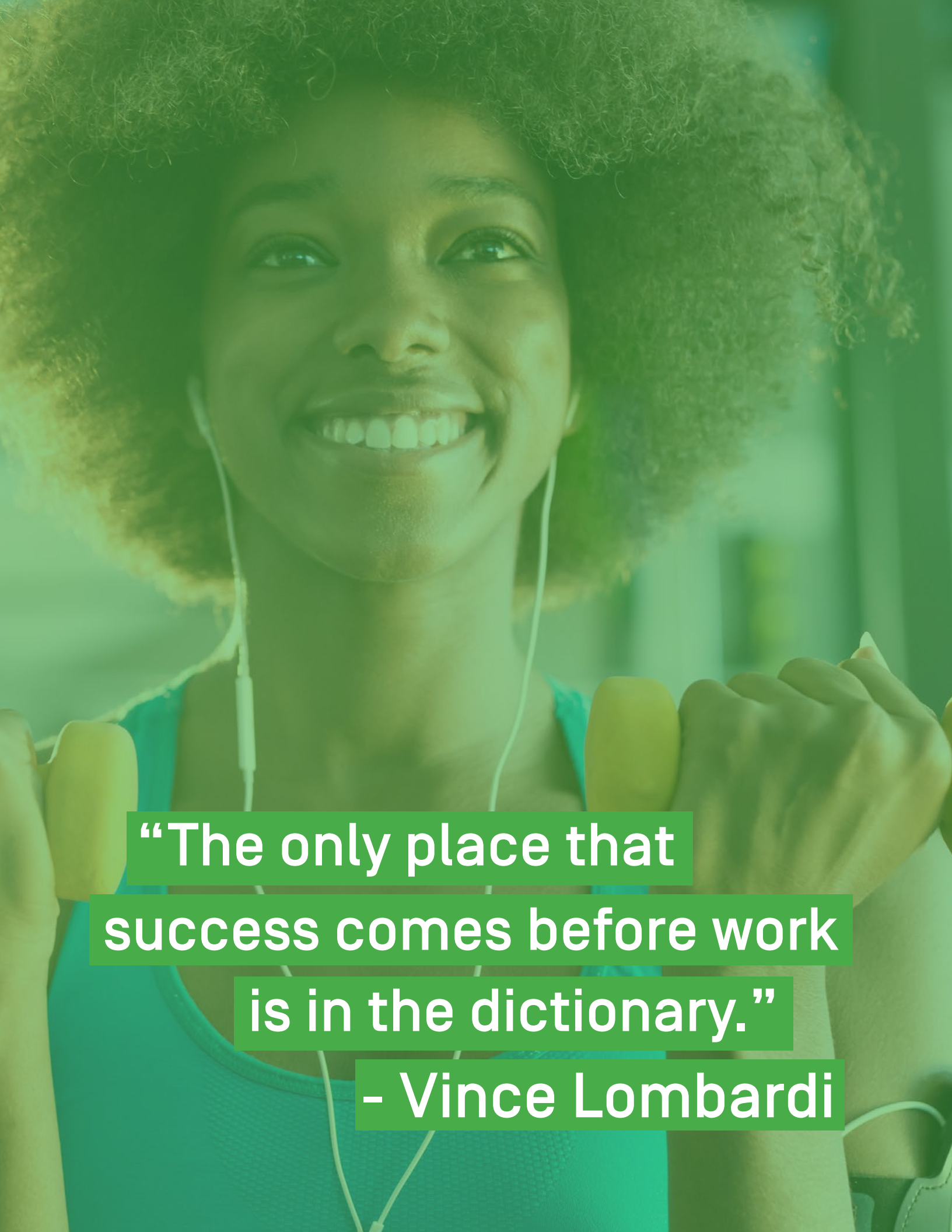
### *Coaching Sessions*

- Preparation and time management of sessions
- Define Agenda
- Co-Create Action Plan
- Coach Clients on How to use Tools
- Questions
- Set Goals and Challenges
- Reaffirm with positive statements
- Document Session Progress

### *Evaluation and Follow-up*

- Client Evaluation
- Closing Statements
- Coaching Program Termination





**“The only place that  
success comes before work  
is in the dictionary.”**

**- Vince Lombardi**

# 10 Ways to Dive into NF

Getting started can be intimidating! Make it easier by taking it step-by-step and day-by-day. These ten steps are designed to help you take action, stay motivated, and make Nutrition Factors an important part of your coaching business:

## ***1. Immerse Yourself***

Use the Coaching Portal every day—you'll quickly realize how much you can now do! Get to know the platform to better increase your success in coaching clients.

## ***2. Get Support***

We're building a community of like minded professionals willing to support one another. Start by connecting with your Referring Coach or by reaching out to our Support Team.

## ***3. Set Goals***

Successful Coaches use goals to hold themselves accountable to their action plans. Connect your goals to key activities to prioritize the activities that drive results. Review your goals frequently to track your progress.

## ***4. Hold yourself Accountable***

Share the goals you've written down with others. You create an system of accountability that will keep you on track when you share ideas, motivations, and goals with trusted colleagues.

## ***5. Plan your Schedule***

Time is the most valuable thing you spend. Plan your schedule to put yourself in a place to succeed. Be effective and efficient with how you use your time.

## ***6. Start Talking***

Don't be shy. Every day offers a new opportunity to share your passion. Talk to at least one person every day about your coaching business—talk about meal and workout plans, goals and motivations, or what your Nutrition Factors means to you. Speak from the heart and people will listen.

## ***7. Get Social***

The internet makes the world a much smaller place. Take advantage of social media to find new clients and connections. The Coaching Portal makes it possible to coach clients throughout the world with video chat and online tools.

## ***8. Get in Front of Large Groups***

Get comfortable speaking in front of large groups to better increase your chances of finding new clients. Chase opportunities that drive high volumes of leads including business, gyms, spas, and schools.

## ***9. Build your Team***

Supplement your strengths and weaknesses by surrounding yourself with talented wellness professionals. Start by making a list of traits and qualities you would love to see join your coaching team. Then keep an eye open for potential team member that fit your descriptions.

## ***10. Stay positive***

A positive attitude can go a long way to enabling your success. Find ways to create a positive mindset including surrounding yourself with a positive environment, find an optimistic viewpoint in a negative situation, and practicing what you preach. Let your positivity rub off on those around you!



**“They know enough who  
know how to learn.”**

**- Henry Adams**

# Resource Library

[partners.nutritionfactors.com/resource-library](https://partners.nutritionfactors.com/resource-library)

Your place to find materials, trainings, and recorded webinars.

*Found within the Resource Library:*

- Coach Training Videos
- Coaching Forms
- Marketing Materials
- Client Training Videos
- Support Documents
- Business Setup
- Recorded Webinars



A young man and woman are laughing together. The man is on the left, wearing a grey t-shirt and red shorts, with blue and white headphones around his neck. The woman is on the right, wearing a white tank top and grey shorts, with white headphones around her neck. She is holding a blue water bottle. The background is a bright, slightly blurred outdoor setting. The entire image has a semi-transparent red overlay.

**“The way to get started is to  
quit talking and begin doing.”**

**- Walt Disney**



# Setting up your Coaching Portal

Dive deeper. This section offers expanded step-by-step directions on to set up each aspect of your Coaching Portal.

## ■ *Set up your Coaching Profile*

Set up your public facing Coaching Profile to share with new and prospecting clients.

## ■ *7 Day GRID Meal Planner*

Learn how to build meal plans that your clients will love with the Recipe Database and 7 Day GRID Meal Planner.

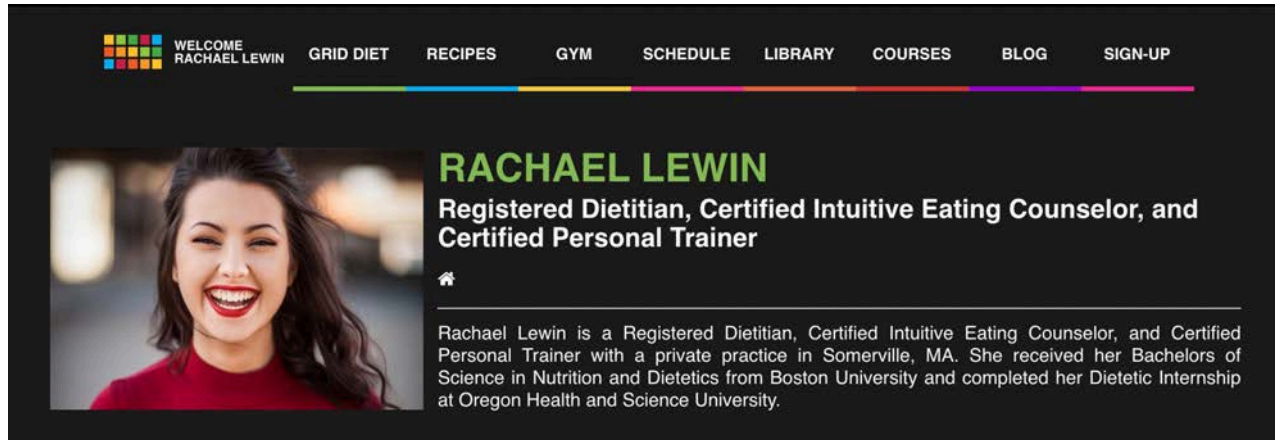
## ■ *Telehealth Webportal*

Connect directly to your clients by a secure HIPPA compliant Telehealth Webportal.

## ■ *Scheduling*

Set up your favorite scheduling app to connect directly to your help Coaching Portal.

# Set up your Coaching Profile



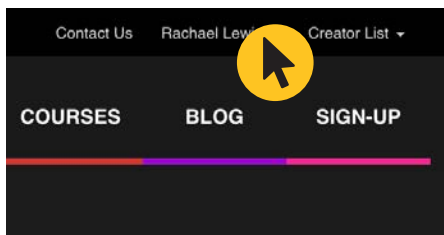
Your Coaching Page is your public facing microsite that you will share with new and prospecting clients. Follow these steps to set up your Coaching Profile. Visit the Resource Library for comprehensive training videos on how to set up your Coaching Profile.

Resource Library: [partners.nutritionfactors.com/resource-library](https://partners.nutritionfactors.com/resource-library)

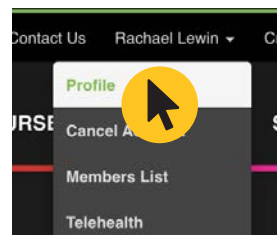
## Edit your Profile

Navigate to 'Your Name' Menu in top right corner > Select Profile > Select Set-Up/Edit Profile

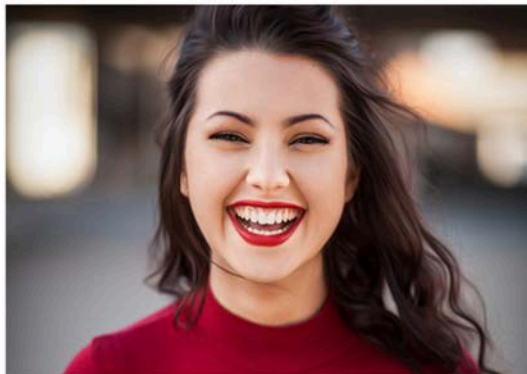
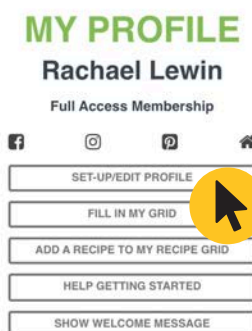
1



2



3



### About Me

Rachael Lewin is a Registered Dietitian, Certified Intuitive Eating Counselor, and Certified Personal Trainer with a private practice in Somerville, MA. She received her Bachelors of Science in Nutrition and Dietetics from Boston University and completed her Dietetic Internship at Oregon Health and Science University.

## Field Descriptions

In order for your Coaching Profile to appear fully complete on your public Coaching Page, it is recommended that you fill in the following fields: First Name, Last Name, Email, About Me, and Credentials. Optional fields include Phone, Website Link, and social media accounts.

Always save after making any changes to the fields.

The screenshot shows a coaching profile form with the following fields and values:

- Upload image\***: A profile picture of a woman and a "Choose a file" button.
- First Name\***: Rachael
- Last Name\***: Lewin
- Email**: rachaelglewin@gmail.com
- Phone\*** (private - not visible to the public): [Empty]
- Website Link** (Full URL path including http:// or https://): [Empty]
- Facebook Account**: [Empty]
- Instagram Account**: [Empty]
- Pinterest Account**: [Empty]
- Twitter Account**: [Empty]
- Youtube Account**: [Empty]
- About Me\***: Rachael Lewin is a Registered Dietitian, Certified Intuitive Eating Counselor, and Certified Personal Trainer with a private practice in Somerville, MA. She received her Bachelors of Science in Nutrition and Dietetics from Boston University and completed her Dietetic Internship at Oregon Health and Science University.
- My Company**: [Empty]
- Credentials**: Registered Dietitian, Certified Intuitive Eating Counselor, and Certifi
- Affiliate ID**: 19991
- Telehealth Link**: https://nutritionfactors.doxy.me/rachaellewin
- Billing Link\***: https://officeally.com
- Schedule Link**: https://calendly.com/rachaellewin
- User Name (Financial Center)**: rachaellewin

At the bottom, there are two buttons: "SAVE" (highlighted with a mouse cursor) and "NEXT: GRID".

**First and Last Name:** Your First and Last Name

**Email:** Your professional Email Address

**Phone:** Your professional Phone Number

**Website Link:** You Business Website Link. Must include http:// or https://

**Social Media:** Links to your Facebook, Instagram, Pinterest, Twitter, or YouTube accounts

**About Me:** Your professional bio or description

**My Company:** Your company's name

**Credentials:** Your listed professional credentials

**Affiliate ID:** Pre-defined field containing your affiliate number used for commissions.

**Telehealth Link:** Pre-defined field containing your Telehealth Webportal link

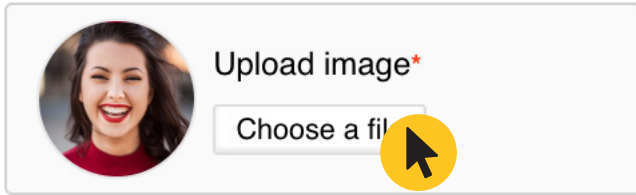
**Billing Link:** Pre-defined field containing your Billing Link

**Schedule Link:** Link to your defined scheduling calendar

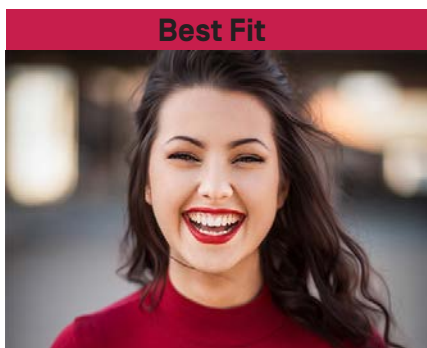
**User Name (Financial Center):** Your Nutrition Factors Username

## Upload your Photo

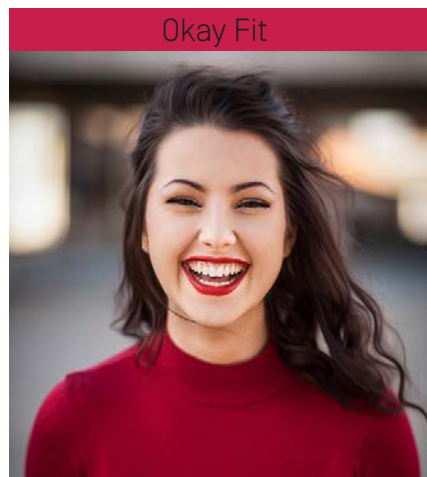
Select Set-Up/Edit Profile within your Profile Page > Upload image > Choose a file



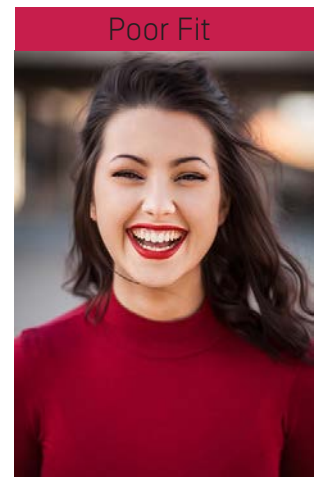
■ Recommended image size: 500 x 350 px



Landscape: 500 x 350 px



Square: 350 x 350 px



Portrait: 350 x 500 px

# 7 Day GRID Meal Planner

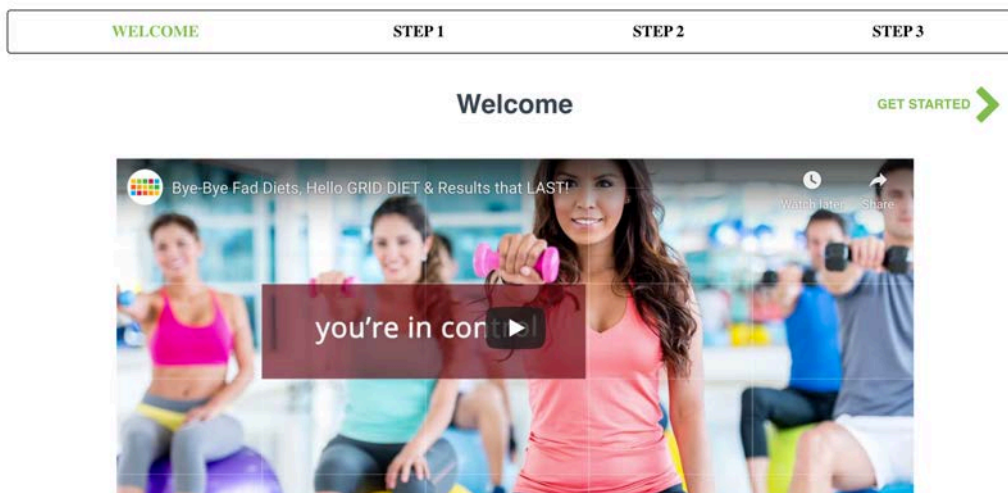
Learn how to build meal plans that your clients will love with the Recipe Database and 7 Day GRID Meal Planner. Follow these steps to learn how to use the 7 Day GRID Meal Planner, Recipe Database, and manage clients. Visit the Resource Library for comprehensive training videos on how to use the 7 Day GRID Meal Planner.

Resource Library: [partners.nutritionfactors.com/resource-library](https://partners.nutritionfactors.com/resource-library)

For Coaches new to Nutrition Factors, it is recommended that you use the 7 Day GRID Meal Planner before you coach others how to use the tool. Follow these steps to set up your own GRID.

## Set up My GRID

Navigate to the GRID DIET tab on the Main Menu > Select Set-up My Grid



### WHAT IS THE GRID DIET?

The Grid Diet (Lifestyle Eating Plan) is a simplified and sensible eating plan that helps you choose and track the foods you eat. The Grid Diet was developed by a Dietitian with eating in mind, and each grid is properly balanced for nutrients and calories. The Grid Diet is not a fad or quick fix diet, but rather an eating plan that you can follow for life. Each grid is properly balanced to meet your body's daily energy and nutrient needs. No starvation or elimination of food groups required. Just choose a grid and follow the simple grid pattern, and before you know it, you will be reprogramming your unhealthy eating habits and losing weight.

Each Grid starts with the basic foundation of (approximately) a 1,500 calorie diet and then increases from there by adding more calories and nutrients. There are different grid patterns to choose from, and a new grid can be selected daily or changed during the day. Choose the grid and foods that are right for your calorie/energy needs.

Whether you are wanting to lose weight or maintain a healthy weight, we have a plan for you. Having the proper tools and knowledge will help you succeed and reduce your health risks of diet related diseases.

### INSTRUCTIONS ON HOW TO CHOOSE A GRID

We're here to walk you through our exclusive Grid Diet in three simple steps!

1. Calculate Your Energy Needs
2. Decide What You're Eating For
3. Select a GRID That is Right for You

Once you have selected your grid, you'll have access to our 7-day meal planning system that allows you to fill your grid with tasty recipes and various foods!

## Step 1: Calculate Your Energy Needs

From the Welcome Page Select Next > Calculate your Calorie/Energy Needs



In order to lose and maintain your desired weight, it is important to know how many calories you need per day. If you consume too many calories, over time this will result in weight gain. If you consume too few of calories, this will result in weight loss but also a sluggish metabolism and possibly malnutrition. By calculating your needs you'll know how to best support your body during the weight-loss process.

Select your measurement system, gender, height, current weight, age, and activity level. Your results will automatically be generated to the right of the Energy Needs Calculator.

**Measurement System:**  
 US/Imperial  Metric

---

**Gender:**  
 Male  Female

---

**Height:**

**Weight:**  **Age:**

**Activity Level:**

Your information is calculated here as you enter your information to the left

- **Body Mass Index (BMI)** 24.3
- **Ideal Body Weight** 141 lb
- **Daily Calorie Expenditure** 2276 kcal
- **Weight Loss Calculator** 1776 kcal
- **Water Needs** 78 oz

**Click on colored boxes to see what your results mean**

For individuals with BMI's >30, use "Ideal Body Weight" result or "Adjusted Body Weight" to calculate daily calorie needs. Adjusted Body Weight Formula- (Ideal Body Weight + (0.4 (Current Body Weight - Ideal Body Weight)))

[Next](#)

Tip: Click colored box to learn more about your results.

- **Body Mass Index (BMI)**
- **Ideal Body Weight**
- **Daily Calorie Expenditure**
- **Weight Loss Calculator**
- **Water Needs**

**Body Mass Index(BMI)**

<b>Underweight</b> <18.5 <small>A BMI&lt;18.5 indicates that you are underweight and at risk for malnutrition. Consider seeing a healthcare provider to determine the cause.</small>	<b>Healthy Weight</b> 18.5-24.9 <small>A BMI between 18.5-24.9 is considered normal for adults. A normal BMI reduces your risk of developing chronic diseases.</small>	<b>Overweight</b> 25.0-29.9 <small>A BMI between 25.0-29.9 indicates that you are overweight for your height and weight. Overweight people have an increased risk for developing hypertension, diabetes, certain types of cancer and heart disease.</small>	<b>Obese</b> >30 <small>A BMI&gt;30 indicates that you are obese and are at high risk for developing hypertension, diabetes, certain types of cancers and heart disease. It is recommended to see a healthcare provider.</small>
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**How Much Water Do I Need Per Day?**

Calculation: (Weight in pounds)/2.8 = # of 8 oz glasses of water per day

<b>Signs of DEHYDRATION</b>	<b>% Water</b>	<b>Functions of Water</b>
1. Increased Thirst 2. Dark Yellow or Brown Urine 3. Decrease Urine Output 4. Dry Skin, Lips and Mouth 5. Weakness and Fatigue 6. Headache and Confusion 7. Sluggish Memory 8. Muscle Cramps 9. Constipation 10. Decreased Performance	Body 60-70% Brain 75-80% Heart 75-80% Lungs 80-85% Liver 70-75% Kidneys 80-85% Skin 65-70% Blood 80-85% Bones 25-30% Muscles 75-80% <small>Percentages are approximate and will vary with individual</small>	1. Medium for all reactions in the body 2. Hydrates 3. Moistens, protects, cushions 4. Lubricates 5. Regulates body temperature 6. Flushes out wastes 7. Prevents constipation 8. Buffers

## Step 2: Select a GRID

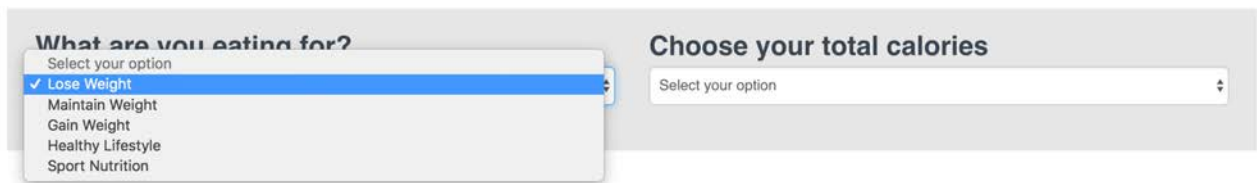
From Step 1: Calculate your Calorie/Energy Needs > Next



### What are you eating for?

Choosing the correct GRID begins by defining what you are eating for. Are you eating to Lose Weight, Maintain Weight, Gain Weight, Healthy Lifestyle, or Sport Nutrition?

Select the option that fits your need.



### Determine Your Calorie /Energy Needs

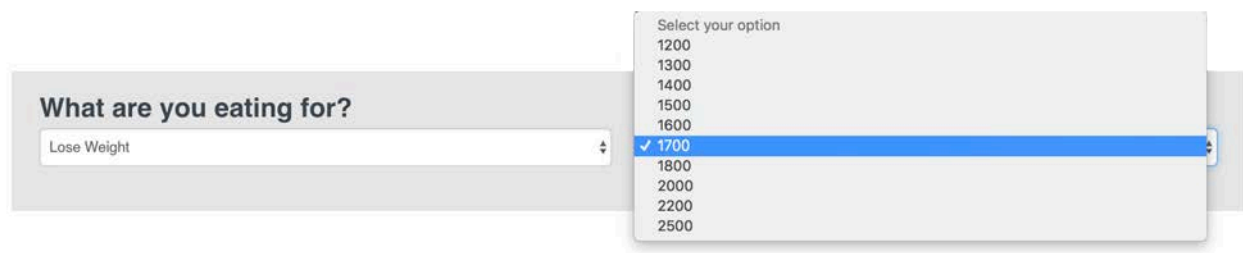
Your energy needs were calculated in Step 1: Calculate your Energy Needs. Energy is listed in calories. To move forward, you must know how many calories you need per day to achieve your goals in a healthy fashion.

#### Energy Needs calculated in Step 1

Body Mass Index (BMI)	24.3
Ideal Body Weight	141 lb
Daily Calorie Expenditure	2276 kcal
Weight Loss Calculator	1776 kcal
Water Needs	78 oz

### What are you eating for?

Once you have determined your energy needs, you can choose a GRID that meets your needs. If you are trying to lose weight, choose a grid that is 500 calories less than your calculated daily energy needs. There are 3500 calories in a pound and decreasing your caloric intake by 500 calories per day should result in a one-pound weight loss per week. The recommended weight loss per week is 1-2 lbs. per week.



You must select an option to advance.

## Step 3: Select an Option

From Step 2: Select a GRID > Next

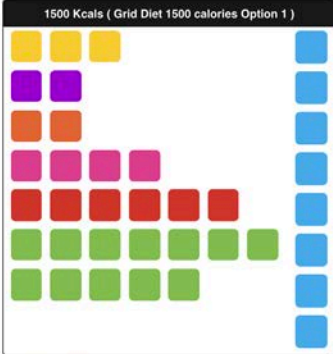
WELCOME
STEP 1
STEP 2
STEP 3

←
BACK

### Select an option

**1500 Kcals (3 Options)**

Click to View Option 1



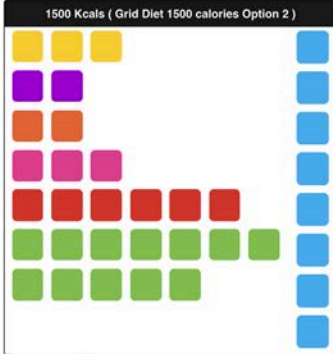
**Grid Diet 1500 calories Option 1**  
(1500 Kcals)

Option 1-1500 This grid was designed to allow more of the good fats founds in nuts, avocados and seeds. Select: 3 Fats, 2 Dairy/Milk, 2 Starches/Grains, 4 Fruits, 5 Proteins and 12 Vegetables. Tips: Check out the list on types of fats listed in the overview of the fat section. Aim to increase your intake of monounsaturated fats as they are heart healthy.

SELECT & SAVE

■	: Water	■	: Snack	■	: Fat
■	: Dairy/Non-Dairy	■	: Starch-Grain	■	: Fruits
■	: Sweeteners-Drinks-Alcohol	■	: Protein-Meats	■	: Vegetables
■	: BrandedFood	■	: Miscellaneous		

Click to View Option 2



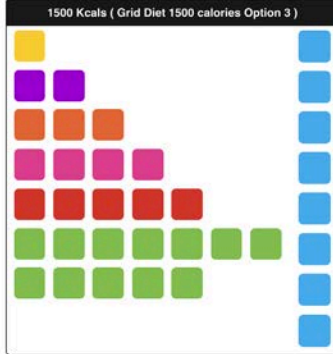
**Grid Diet 1500 calories Option 2**  
(1500 Kcals)

Option 2-1500 This grid adds an extra serving of protein and fat. Select: 2 Fats, 2 Dairy/Milk, 2 Starches/Grains, 4 Fruits, 6 Proteins/Meats and 12 Vegetables. Tips: Choose your proteins wisely as they can contain extra fat. Choose healthy fats such as seeds and nuts. Limit high fat cheeses and read the label, as calories will vary depending on brand.

SELECT & SAVE

■	: Water	■	: Snack	■	: Fat
■	: Dairy/Non-Dairy	■	: Starch-Grain	■	: Fruits
■	: Sweeteners-Drinks-Alcohol	■	: Protein-Meats	■	: Vegetables
■	: BrandedFood	■	: Miscellaneous		

Click to View Option 3



**Grid Diet 1500 calories Option 3**  
(1500 Kcals)

Option 3-1500 This grid limits fat and adds an extra grain/starch. It is intended for people who have been advised by their physician to follow a low fat diet. Select: 1 Fat, 2 Dairy/Milk, 3 Grains/Starches, 4 Fruits, 5 Proteins/Meats and 12 Vegetables. Tips: Whole grains are high in fiber and nutrient dense! Gluten free and gluten selections available. If you want additional fat in your diet, choose option 2 or 3.

SELECT & SAVE

■	: Water	■	: Snack	■	: Fat
■	: Dairy/Non-Dairy	■	: Starch-Grain	■	: Fruits
■	: Sweeteners-Drinks-Alcohol	■	: Protein-Meats	■	: Vegetables
■	: BrandedFood	■	: Miscellaneous		

### Choose the GRID that meets your preference

First choose a GRID that meets your caloric needs and then choose a grid pattern. View options 1, 2, and 3 and decided which best fits your preferences. The grids come in several patterns and can be changed daily. Some grids will offer more fat options while other grids will have more protein options or other selections. You can change your grid daily and even during the day, by resetting the grid. Each grid will keep you within your target nutritional needs. You can also experiment with lower and higher calorie grids each day, however do not exceed your daily caloric needs.

Note: If you do not want to use a pre-designed GRID, you can create your own GRID by selecting create a GRID from the drop down menu and clicking change within the 7 Day GRID Meal Planner.



## Fill in My GRID

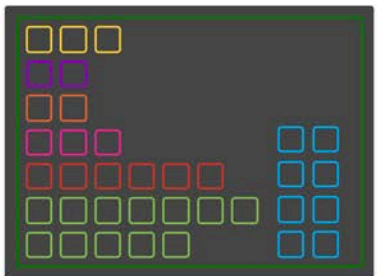
Navigate to the GRID DIET tab on the Main Menu > Select Fill in My Grid

**Editing Grid for Rachael Lewin**

Toggle through days of week → MON TUE WED THU FRI SAT SUN DIRECTIONS

BREAKFAST LUNCH DINNER SNACK Create a Grid CHANGE

Pre-Selected GRID →



- : Water
- : Dairy/Non-Dairy
- : Protein-Meats
- : Starch-Grain
- : Vegetables
- : Sweeteners/Drinks/Alcohol
- : Fat
- : Fruits
- : Branded Food

\* Patent Pending. Copyright 2015 & 2019.

	BFAST	LUNCH	DINNER	SNACK	TOTAL
CALORIES:	0	0	0	0	0
FAT:	0g	0g	0g	0g	0g
PROTEIN:	0g	0g	0g	0g	0g
CARBS:	0g	0g	0g	0g	0g
FIBER:	0g	0g	0g	0g	0g

NUTRITION FACTORS GRID MENUS

COACH GRID MENUS

PUBLISH MY MENU PLAN

SEND MENU TO SHOPPING LIST

CLEAR MENU

### 7 Day Meal Planner

The platform is uniquely adaptable, allowing you the ability to effortlessly pick and choose the right meals for your weekly meal plan. Import new recipes or tap into our global database of prepared meal plans.

### Visual GRID Layout

The GRID is a birdseye view of how well balanced your meal is and helps visualize the food groups in a grid-patterned layout. The GRID will begin to populate as you add foods and recipes to your meal plan.

### Nutrition Details

Use the Nutrition Details breakdown to understand how much calories, fat, protein, carbs, and fiber are in your daily meal plan. Track fats and carbs to build a balanced meal plan.

## Build a GRID

Search our recipe database to identify foods and recipes to add to your GRID.

**BUILD A GRID**  
(Start by clicking on a box below to add foods or a recipe)

Select Food Group or Recipe (click here)

Create a Recipe

Search Title Q

Search Ingredient Q

### Select Food Groups or Recipe

Search by food group and highlighted categories to identify the right recipe. This dropdown allows you to search by food groups such as *Water, Fat, Dairy/ No Dairy, Starch/ Grain, Fruits, Protein-Meats,* and *Vegetables*; categories such as *Branded Foods*; and highlighted recipes such as *Recommend Recipes, Featured Recipes,* and *Community Recipes*. You can also save your favorite recipes within *My Foods and Recipes*.

### Search Title






















Search for the recipe or food directly.

### Search Ingredient

Identify recipes by ingredient.

### Add Recipes and Foods to your Daily GRID

After completing a search, scroll through the search results to find and add your desired recipe or food to your Daily GRID. Add selected items to your breakfast, lunch, dinner, or as a snack for your desired day.

Recipe Image	Recipe Name	Full Recipe Page	Serving Size	Visual GRID Nutrition Details	Add to desired meal
	<b>Banana Breakfast Toast</b> <small>CONTAINS GLUTEN</small> Toasty, warm bread topped with yogurt, banana, a drizzle of honey, seeds, and nuts		1 serving (204g)		Add to Breakfast    Add to Lunch    Add to Dinner    Add to Snack
	<b>Kiwi on Toast</b> <small>CONTAINS GLUTEN</small> <span style="border: 1px solid red; padding: 2px;">Expand for description</span>		1 slice of toast (111g)		Add to Breakfast    Add to Lunch    Add to Dinner    Add to Snack
	<b>Persimmon and Blackberry on Toast</b> <small>CONTAINS DAIRY</small>		1/2 recipe yield (134g)		Add to Breakfast    Add to Lunch    Add to Dinner    Add to Snack
	<b>Sautéed Mushrooms over Toast</b> <small>CONTAINS GLUTEN</small> <small>VEGETARIAN</small>		1 slice toast (103g)		Add to Breakfast    Add to Lunch    Add to Dinner    Add to Snack
	<b>Strawberry Toast</b> <small>CONTAINS GLUTEN</small>		1 serving (165g)		Add to Breakfast    Add to Lunch    Add to Dinner    Add to Snack
	<b>Trail Mix Morning Oats</b> <small>CONTAINS NUTS</small>		1 serving (373g)		Add to Breakfast    Add to Lunch    Add to Dinner    Add to Snack
	<b>White Bread (sliced)</b> <small>CONTAINS GLUTEN</small>		1 slice (28g)		Add to Breakfast    Add to Lunch    Add to Dinner    Add to Snack

Click + to expand description of recipe or food.



**“I learned the value of hard work  
by working hard.”**

**- Margaret Mead**

## Populate until GRID is Complete

The 7 Day Meal Planner begins to populate as you add recipes and foods. Continue to fill in your GRID until you hit your limits or fill that your meal plan is complete.

**MON** TUE WED THU FRI SAT SUN DIRECTIONS

BREAKFAST LUNCH DINNER SNACK

1 serving Banana Breakfast Toast Click to see Recipe Page

Added to Monday's Breakfast

Remove Recipe

Design Custom GRID Create a Grid CHANGE

GRID begins to populate

Hover over box to view populating food

Nutrition details begin to populate

Count calories and macros

\* Patent Pending. Copyright 2015 & 2019.

	BFAST	LUNCH	DINNER	SNACK	TOTAL
CALORIES:	288	0	0	0	288
FAT:	6.18g	0g	0g	0g	6.18g
PROTEIN:	11.14g	0g	0g	0g	11.14g
CARBS:	51.45g	0g	0g	0g	51.45g
FIBER:	7.34g	0g	0g	0g	7.34g

NUTRITION FACTORS GRID MENUS  
COACH GRID MENUS  
PUBLISH MY MENU PLAN  
SEND MENU TO SHOPPING LIST  
CLEAR MENU

### Master Tip:

The GRID is compatible with any type of diet plan or meal plan. You can create a custom GRID outside of the guided templates. Simply choose the Create a GRID option above the visual GRID layout and click change. The GRID will change to a blank template where you can layout out any type of plan you want to create.

NUTRITION FACTORS GRID MENUS  
COACH GRID MENUS  
PUBLISH MY MENU PLAN  
SEND MENU TO SHOPPING LIST  
CLEAR MENU

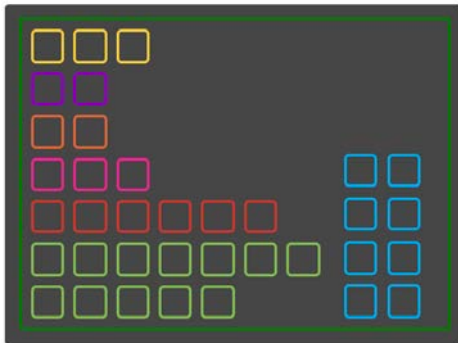
Create a Grid CHANGE



## GRID Templates vs. Create a GRID

The GRID is compatible with any type of diet plan or meal plan. You can choose from our library of pre-designed GRID templates or create a custom GRID to fit your needs.

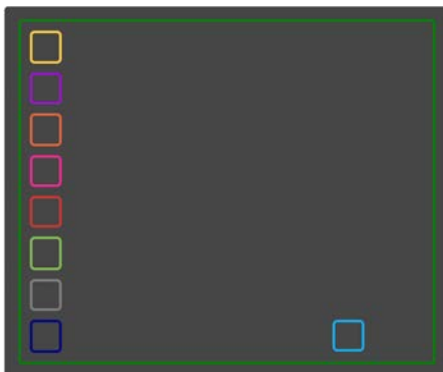
The GRID Templates are designed as suggestions to teach what a balanced meal plan could look like. If you don't want to use a GRID Template, you can create your own GRID from the drop down by selecting *Create a Grid* and selecting the *Change* button.



### GRID Templates

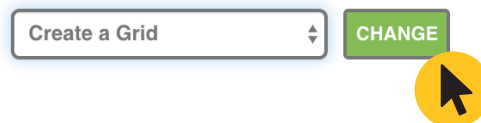
Choose from over 30 pre-designed GRID templates ranging from 1200 calories to 2500 calories.

Note: The GRID template will limit your ability to add more foods and recipes to ensure you stay within the template's boundaries.



### Create a GRID

Simply choose the *Create a GRID* option above the visual GRID layout.



## Send Menu to Shopping List


Export your meal plans as a listed shopping list for convenient purchasing.

After completing your GRID > Select *Send Menu to Shopping List* button


### Shopping List

Back to Grid
Back to Profile
Print
Email List to Self
Remove Selected
Remove by ▾

Delivery Services ▾

 **PROTEIN / MEATS**

<input type="checkbox"/>	Qty	Measurement	egg
<input type="checkbox"/>	Qty	Measurement	trout
<input type="checkbox"/>	Qty	Measurement	beef jerky
<input type="checkbox"/>	Qty	Measurement	chicken

 **PRODUCE**

<input type="checkbox"/>	Qty	Measurement	broccoli
<input type="checkbox"/>	Qty	Measurement	tangerine
<input type="checkbox"/>	Qty	Measurement	mixed salad greens

In addition to the ingredients connected to your GRID, you are able to add additional items to your shopping list.

Add more ingredients...

Select Food Group ▾

Add

## Connect to your Grocer Service

Connect your shopping list to your grocer service for easy shopping.

Shopping List > Delivery Services > Select your Grocer

Delivery Services ▾

<https://www.rosieapp.com>

<https://www.shipt.com>

<https://grocery.walmart.com>

<https://www.instacart.com>

<https://www.kroger.com/topic/clicklist---select-your-store>

<https://www.amazon.com/fresh>

**Add your delivery service link:**

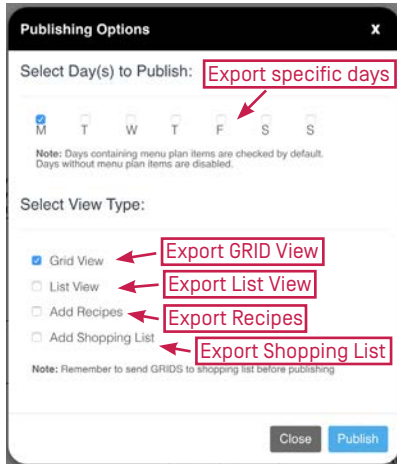
Add Link

# Publish my Grid Menu

Build and export .PDF versions of your 7 Day GRID Meal Planner. Easily create client handouts, recipe books, and shopping lists.

After completing your GRID > Select Publish My GRID Menu

Note: Send meal plan to shopping list before publishing.



## Select Day(s) to Publish

Export the entire week or select specific days.

## GRID View

Export GRID overview of your daily meal planner including meal lists and nutrition facts.

## List View

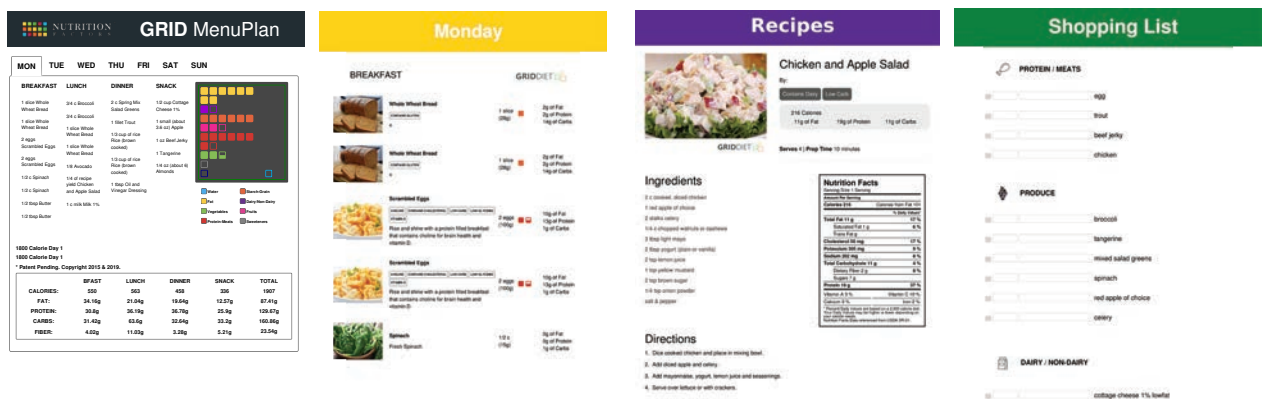
Export more detailed information regarding ingredients and recipes

## Add Recipes

Export each recipe in your daily meal plan.

## Add Shopping List

Export your connected shopping list. GRIDs must be sent to shopping list before publishing.



Note: On average it takes 20-30 seconds for the PDF to render.

## Nutrition Factors GRID Menus

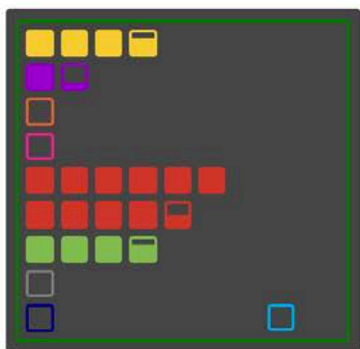
Import approved Nutrition Factors GRIDs into your daily meal plan.

GRID Diet tab > Select Fill in My GRID > Nutrition Factors GRID Menus

Type of Diet
Original Creator
Import into Meal Plan

Date created	Name	Diet Type	Source	Grid	Description	Notes	
Apr 30, 2019	Healthy Keto Day 1	Healthy Keto	Groff Family Fitness / Got Health	30 - Create a Grid	Chicken salad lunch with trout and salad dinner	Healthy Keto Day 1	<div style="display: flex; align-items: center; gap: 10px;"> <input type="button" value="HIDE"/> <input type="button" value="IMPORT"/> </div> <div style="margin-top: 5px;"> <span>Select day of week</span> → <span>Thu</span> </div>

BREAKFAST	LUNCH	DINNER	SNACK
2 eggs Scrambled Eggs	1 cup Chopped Chicken Salad	1/4 of recipe yield Garden Spinach Salad	1 bar Portion Control Bar
3 c Spinach	3/4 c Broccoli	2 tbsp Italian Salad Dressing-Low Calorie	1 bar Portion Control Bar
1 tsp Olive Oil	1/8 Avocado	1 fillet Trout	1 serving Greek Yogurt (100 Calories)
2 eggs Scrambled Eggs	1/8 Avocado		



- : Water
- : Snack
- : Fat
- : Dairy/Non-Dairy
- : Starch-Grain
- : Fruits
- : Protein-Meats
- : Vegetables

	BFAST	LUNCH	DINNER	SNACK	TOTAL
<b>CALORIES</b>	349	378	296	335	1358
<b>FAT:</b>	24.35g	18.97g	10.71g	9.85g	63.88g
<b>PROTEIN:</b>	27.69g	41.71g	35.04g	31.65g	136.09g
<b>CARBS:</b>	4.83g	13.72g	14.86g	38.94g	72.35g
<b>FIBER:</b>	1.98g	6.19g	3.34g	8.0g	19.51g

View Extended Details

Aug 28, 2019	1800 Calorie Day 1	M & M Balanced Plate	Got Health	30 - Create a Grid	Balance your macro-nutrients with scrambled egg breakfast, chicken salad & broccoli lunch and baked trout & spring salad dinner	1800 Calorie Day 1	<div style="display: flex; align-items: center; gap: 10px;"> <input type="button" value="PREVIEW"/> <input type="button" value="IMPORT"/> </div> <div style="margin-top: 5px;"> <span>Day</span> </div>
Aug 29, 2019	1800 Calorie Day 2	M & M Balanced Plate	Got Health	30 - Create a Grid	Balance your macro-nutrients with turkey sausage with egg breakfast, Chicken and Kale and spinach salad mix lunch, Chicken parmesan and black beans dinner	1800 Calorie Day 2	<div style="display: flex; align-items: center; gap: 10px;"> <input type="button" value="PREVIEW"/> <input type="button" value="IMPORT"/> </div> <div style="margin-top: 5px;"> <span>Day</span> </div>



## Import GRID into your Meal Plan

Select GRID > Select Day of Week > Select Import button

### Editing Grid for Rachael Lewin

MON TUE WED **THU** FRI SAT SUN
DIRECTIONS

**BREAKFAST**

- 2 eggs Scrambled Eggs
- 3 c Spinach
- 1 tsp Olive Oil
- 2 eggs Scrambled Eggs

**LUNCH**

- 1 cup Chopped Chicken Salad
- 3/4 c Broccoli
- 1/8 Avocado
- 1/8 Avocado

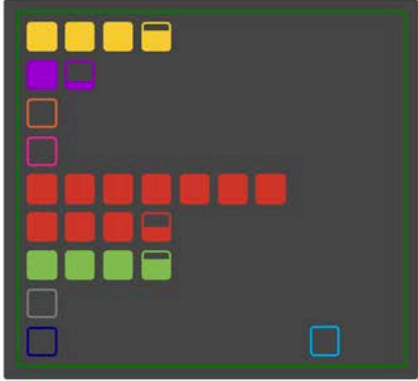
**DINNER**

- 1/4 of recipe yield Garden Spinach Salad
- 2 tbsp Italian Salad Dressing-Low Calorie
- 1 fillet Trout

**SNACK**

- 1 bar Portion Control Bar
- 1 bar Portion Control Bar
- 1 serving Greek Yogurt (100 Calories)

CHANGE



■ : Water     ■ : Starch-Grain     ■ : Fat  
■ : Dairy/Non-Dairy     ■ : Vegetables     ■ : Fruits  
■ : Protein-Meats     ■ : Sweeteners     ■ : Branded Food

Healthy Keto Day 1  
 Healthy Keto Day 1  
 \* Patent Pending. Copyright 2015 & 2019.

	BFAS	LUNCH	DINNER	SNACK	TOTAL
CALORIES:	349	378	296	335	1358
FAT:	24.35g	18.97g	10.71g	9.85g	63.88g
PROTEIN:	27.69g	41.71g	35.04g	31.65g	136.09g
CARBS:	4.83g	13.72g	14.86g	38.94g	72.36g
FIBER:	1.98g	6.19g	3.34g	8.0g	19.51g

NUTRITION FACTORS GRID MENUS

COACH GRID MENUS

PUBLISH MY MENU PLAN

SEND MENU TO SHOPPING LIST

CLEAR MENU

## Your Member List

Add, remove, and manage clients from your Member List.

Navigate to 'Your Name' Menu in top right corner > Select Member List

**MEMBER LIST**

Client Contact Information      Access Client's GRID      Connect to Client Account      Invite via Email

EMAIL CLIENT URL  
CONNECT A NEW MEMBER

Show 10 entries      Search:

NAME	COMPANY	PHONE	EMAIL	GRID MENU	GYM	MEMBERSHIP PLAN	ACTIONS
Gena Denny		801-771-1234	gena.denny@gmail.com	Edit Grid	YES	full	REMOVE
Susan Halley		801-546-4123	SHalley@comcast.net	Edit Grid	YES	full	REMOVE
John Wilson		435-112-1234	johnniew@yahoo.com	Edit Grid	YES	full	REMOVE
Stacy Berry			b_stacy@aol.com	Edit Grid	YES	plus	REMOVE
Shawn Johnson		801-660-2234	mssjohnson@gmail.com	Edit Grid	YES	full	REMOVE
John Michaud		801-825-4321	readytogo@gmail.com	Edit Grid	YES	full	REMOVE
Carol McKinney		800-645-1233	Carol.McKinney@google.com	Edit Grid	YES	full	REMOVE
Scott Reynolds		801-898-4581	reynoldss@mail.com	Edit Grid	YES	plus	REMOVE
Dale Marquez		385-623-1235	dale.marquez12@hotmail.com	Edit Grid	YES	full	REMOVE

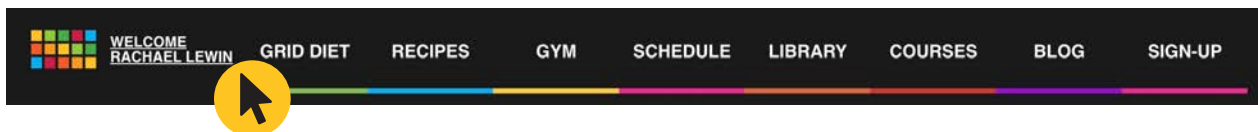
Showing 1 to 9 of 9 entries      Previous 1 Next

## Add New Client

There are two primary ways to add a new client to manage.

### Share your Coaching Portal URL

Identify your URL by clicking the Welcome 'Your Name' hyperlink on the left part of the main menu within your Coaching Portal.



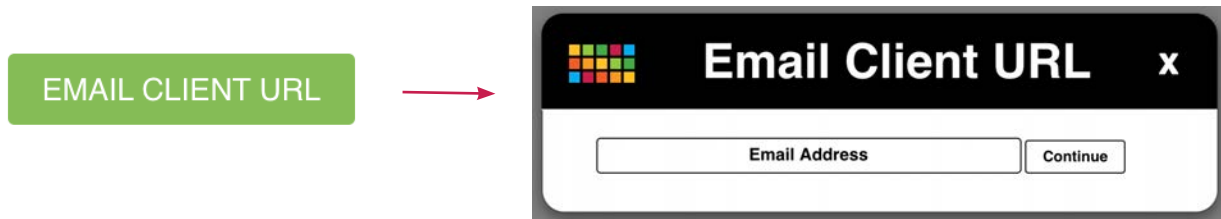
Your Coaching Portal will be <https://nutritionfactors.com/coach/yourusername>

[nutritionfactors.com/coach/rachaellewin/](https://nutritionfactors.com/coach/rachaellewin/)



### Email Client URL

Select the 'Email Client URL' to send an automated email directly to your client containing your URL to sign up.



### Sign-up Client

Share your Coaching Portal URL with any new or prospecting clients. Have them navigate to the Member Plans page by selecting 'Sign-up' in the menu bar.

Have the client the GRID MENU & FITNESS Membership.

**Best Price** ▼

**GRID MENU & FITNESS**  
MEMBERSHIP

**\$9.99/month**  
monthly access

Your MENU & FITNESS membership gives you access to:

- > WEEKLY PRE-FILLED GRID AND MENU PLANS DESIGNED BY A COACH
  - > GRID GYM FITNESS APP
    - > GRID DIET
    - > RECIPES
  - > NUTRITION LIBRARY
  - > NEWSLETTER

Easy to use nutrition and fitness software to help you manage your health, weight, meal plans and fitness routines. See how easy it is to create or import yummy menu and fitness plans for you and your family. Nutrition Factor's is powered by Registered Dietitians, Health Coaches and other professionals dedicated to deliver the tools and information you need to live a healthy and happy life.

This membership is for those who want access to a world-class nutrition and fitness program and pre-designed plans.

**Get started now!**

**PURCHASE NOW**

## Connect a New Member

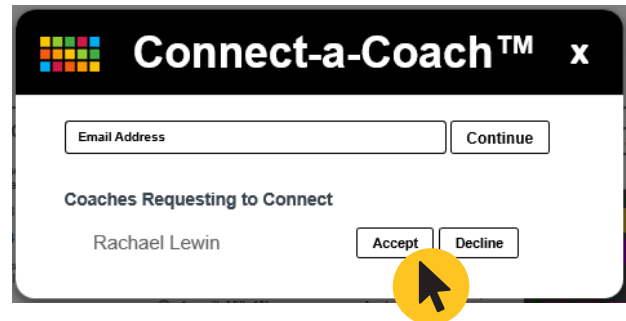
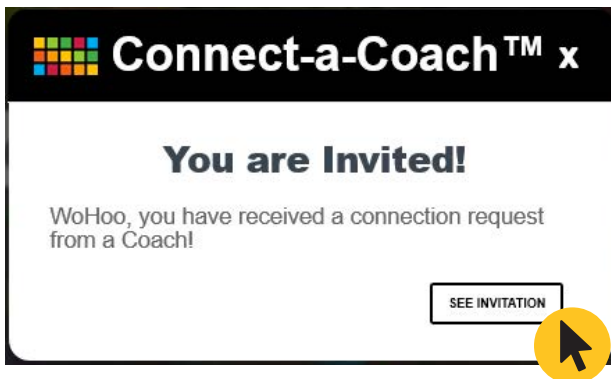
In order for your client to connect with you as coach, the client must sign up for an account from your unique portal's URL. Once your client becomes a Member, you will see their name on your Member List found under your name in the upper right hand corner of the screen.

Even though your client's name displays on your Member List, you will need to ask permission to enter into your client's account to add GRID MEAL plans.

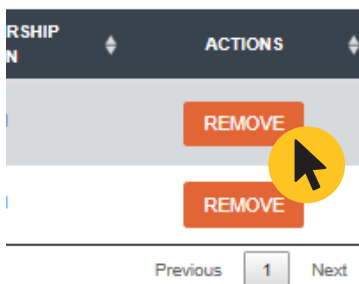
Click on the green *Connect a New Member* button to connect to your client. This button will send an invite to the client's portal to connect with you as a coach. The client will then have the ability to accept or deny or request. This button can also be used to connect an existing coach to your Coaching Portal.



The client receives this message to connect. Instruct your Client to Accept the request.



A coach can remove a client from their Coaching Portal by clicking the remove button in their Member List.



Note: Only do meal plans for client's within your scope of practice. If a client requires meal specific meal plans beyond your scope of practice, teach the client to use the meal planner.

## Edit Client's GRID

Access a Client's GRID to edit or review their 7 Day GRID Meal Planner.

Find Client > Select Edit Grid



You will then have full access to edit and review their weekly meal plan.

### Editing Grid for Gena Denny ← Client Account

MON
TUE
WED
THU
FRI
SAT
SUN

[DIRECTIONS](#)
[EXIT](#)

**BREAKFAST**

- ⊙ 1/2 recipe yield Scrambled Eggs with Almond Milk
- ⊙ 1/2 c Spinach
- ⊙ 1 tsp Butter
- ⊙ 1 c milk Soy Milk
- ⊙ 1 slice of bread Bread (Whole Grain)

**LUNCH**

- ⊙ 1 serving Buns, Thin (Sara Lee)
- ⊙ 1/8 Avocado
- ⊙ 3/4 c Broccoli
- ⊙ 1 cup Chopped Chicken Salad

**DINNER**

- ⊙ 2 tsp Italian Salad Dressing-Low Calorie
- ⊙ 1 fillet Trout
- ⊙ 2 c Spring Mix Salad Greens
- ⊙ 1 med tomato Tomato
- ⊙ 1 c milk Milk 1%

**SNACK**

- ⊙ 1 stick String Cheese (low moisture mozzarella)
- ⊙ 1 Tangerine
- ⊙ 1/4 oz (about 6) Almonds
- ⊙ 1/4 oz (about 6) Almonds
- ⊙ 1 small (about 3.6 oz) Apple

1400 Calorie M&M-Day 1 (High Protein)  
Choose your M&M items to match your number of servings.  
\* Patent Pending. Copyright 2015 & 2019.

	BFAST	LUNCH	DINNER	SNACK	TOTAL
CALORIES:	323	433	378	234	1368
FAT:	19.05g	16.65g	13.05g	11.43g	60.19g
PROTEIN:	16.8g	44.86g	43.18g	8.43g	113.27g
CARBS:	21.18g	31.75g	22.03g	29.47g	104.43g
FIBER:	3.88g	8.06g	2.42g	5.4g	19.76g

[CHANGE](#)

**Legend:**

- Water
- Starch-Grain
- Fat
- Dairy/Non-Dairy
- Vegetables
- Fruits
- Protein-Meats
- Sweeteners/Drinks/Alcohol
- Branded Food

[NUTRITION FACTORS GRID MENUS](#)
  
[COACH GRID MENUS](#)
  
[PUBLISH MY MENU PLAN](#)
  
[SEND MENU TO SHOPPING LIST](#)
  
[CLEAR MENU](#)

As their Coach, you can edit their GRID as though it were your own.



**“As coaches, we equip people to be in touch with their best selves.”**

**- Clyde Lowstuter**

# Telehealth Webportal

Connect directly to your clients via a secure HIPPA compliant Telehealth Webportal. Nutrition Factors partners with Doxy.Me to offer secure client video chats and group chats.

## ***Set up your Telehealth Webportal***

Your webportal has already been set up!

### **Identify your Telehealth Links**

There are two links with which you need to become familiar. The first is for you to log in to the Telehealth Webportal. The second is for you share with clients.

#### **Doxy.me Provider Login Link**

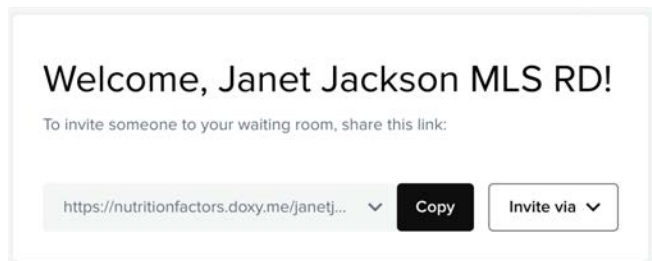
Navigate to your profile menu > Select *Telehealth* > Log in with correct credentials

**Provider Login:** *nutritionfactors.doxy.me/sign-in*

*Note: Password is seperate from your Nutrition Factors password. If you change one, be sure to change the other.*

#### **Client Link**

Once logged in, identify your unique link in which you will share with your clients.



Make note of your Telehealth link below.

**Telehealth Link:** *nutritionfactors.doxy.me/* \_\_\_\_\_

*Note: Your telehealth link is nutritionfactors.doxy.me/yourusername. Your username is typically your first name + your last name. No spaces.*

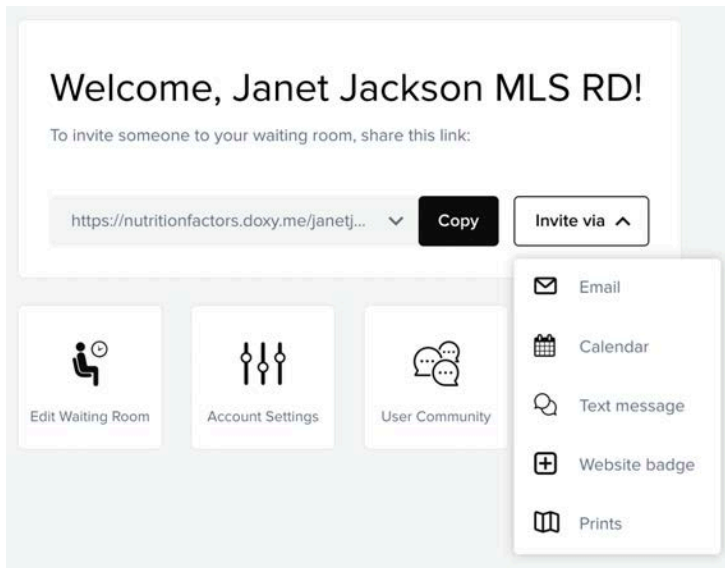
## How to Invite a Patient to your Room

To invite a patient to your room, simply share your room link with your patient however you want:

<https://nutritionfactors.doxy.me/yourusername>

### Use the invite button

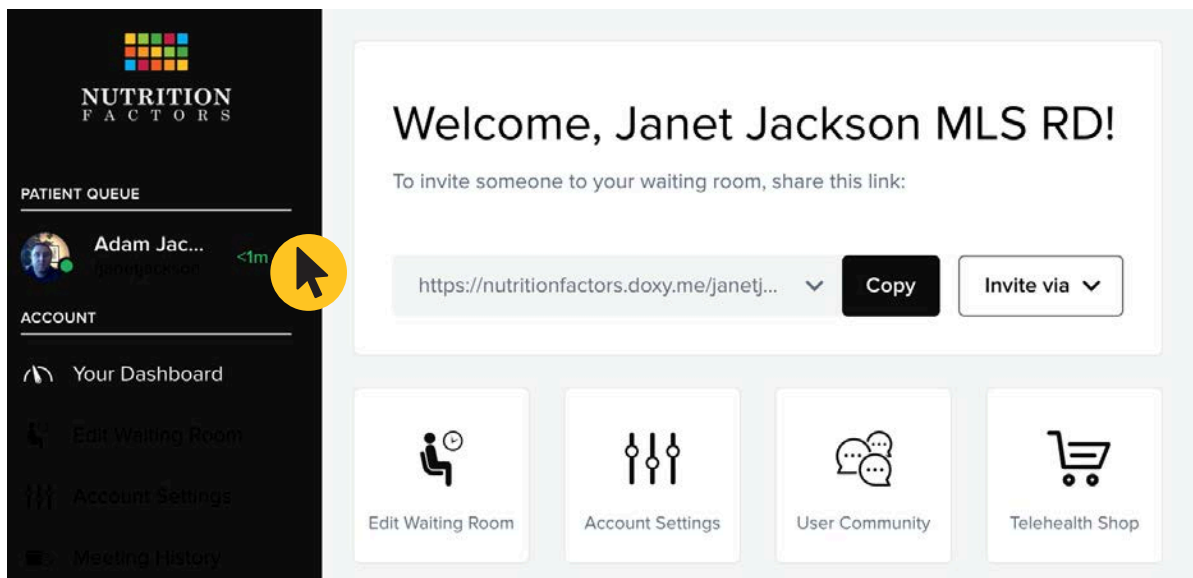
We make it easy to share your room link using the invite button, which allows you to send by email, send as a calendar invite, send as text message, and post on Facebook or Twitter.



## How to Start a Call with your Patient

When your patient arrives in your room, they will appear in your "Patient Queue" on the top left side of your dashboard. Click on their name to start the video call.

If multiple patients are present, select the patient you want to have a call with.

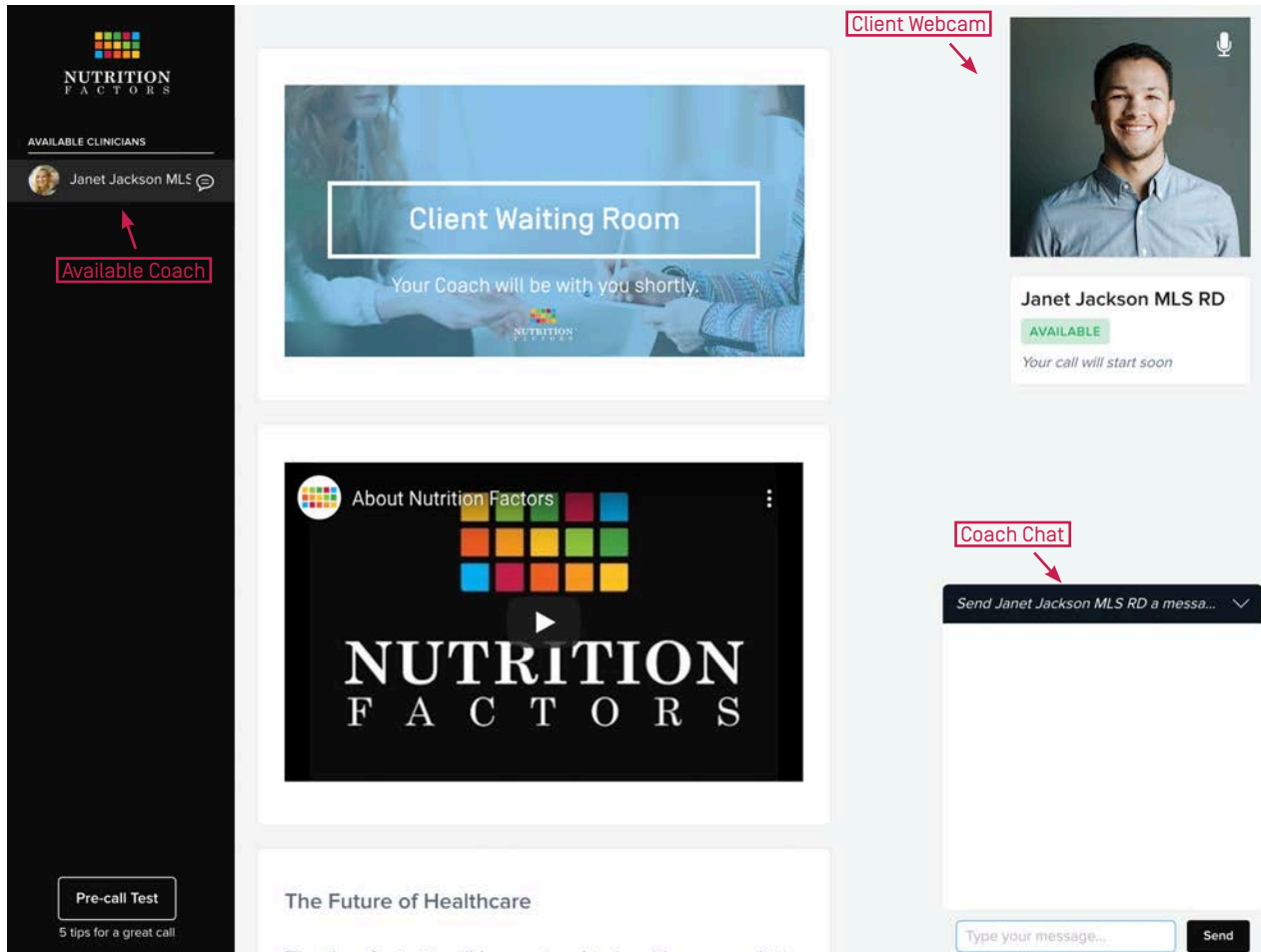




## Waiting Room Overview

After your patient checks in to your room, they will be placed in your waiting room that can be personalized. In the waiting room, patients can view text and images, watch videos, send and receive a chat message .

What your patient will see:



## Patient Queue Overview

Our new patient queue will tell you if patient allowed access to their camera and microphone, how long the patient has been waiting location of the patient, what type of device they are on, Wi-fi strength, what browser they are on.

You will be able to do the following:

Send a chat message

Start an audio only call

Send/receive a file

Collect payments

Remove patient from the waiting room

The screenshot displays the Nutrition Factors Patient Queue interface. On the left is a dark sidebar with the Nutrition Factors logo and a menu under 'ACCOUNT' including: Your Dashboard, Edit Waiting Room, Account Settings, Meeting History, Help Center, and Logout. The main area shows a 'PATIENT QUEUE' with a list of patients. The selected patient, Michael Monroe, is shown in a detailed view. At the top, a welcome message reads 'Welcome, Janet Jackson MLS RD!'. The patient's profile includes a photo, name 'Michael Monroe', and status 'waiting <1m in /janetjackson from Utah, United States'. Technical details show 'Laptop/Desktop' with 'Fair' Wi-Fi, 'Mac' OS, and 'Chrome 78' browser. Action buttons for 'Chat', 'Audio call', 'More', and 'Remove' are visible. A 'More' dropdown menu is open, showing 'File Transfer' and 'Payment' options.

## Send/ Receive a File

File transfer is a HIPAA compliant way to send files between you and your patient. This is a better alternative to emails as the data you send might contain PHI.

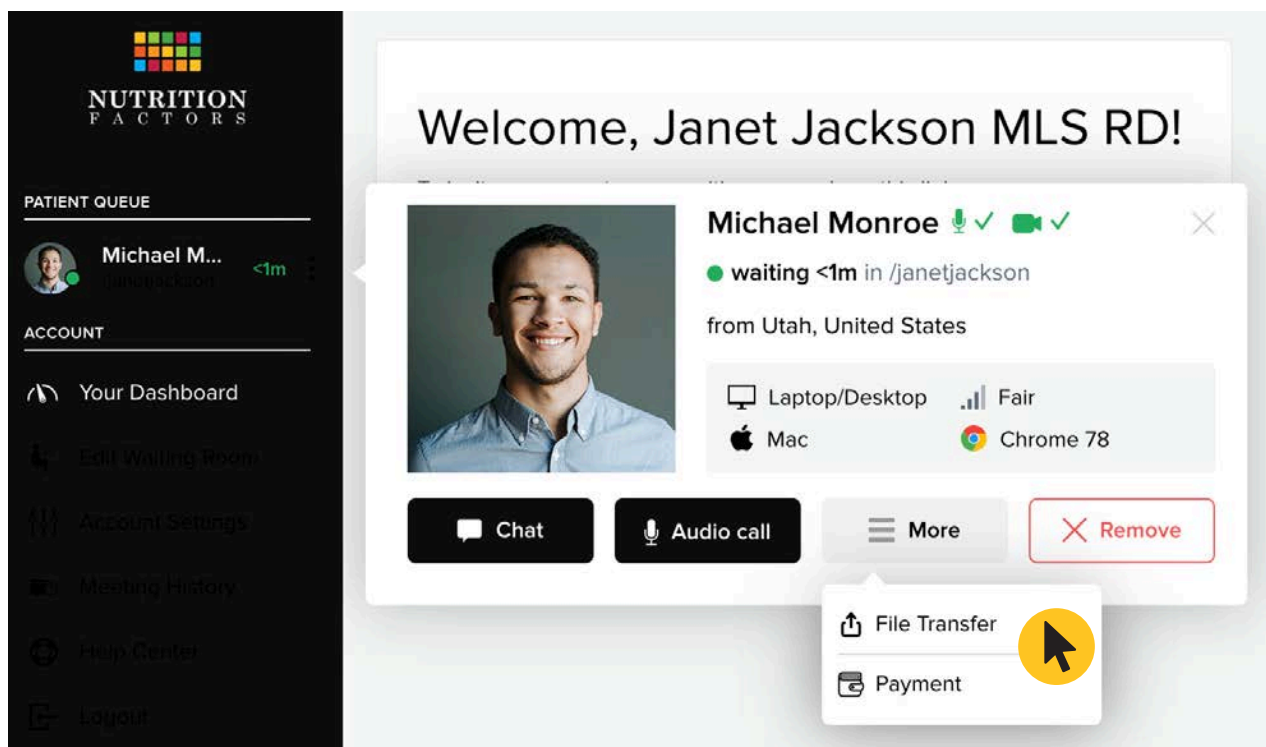
### To send a file from the waiting room:

Click the three dots in the patient queue > Select *More* > Select *Send File*

### To send a file while on a call:

While on a call click *File Transfer* on the left panel > Select *File Transfer*

Tell your patient to accept the transfer.



### To receive a file from the waiting room:

Click the three dots in the patient queue > Select "More" Select Request file

Patient will select the file to share.

### To receive a file from while on a call:

Click *File Transfer* on the left panel > Select Request file from patient > Select file to share

Patient chooses file from their computer

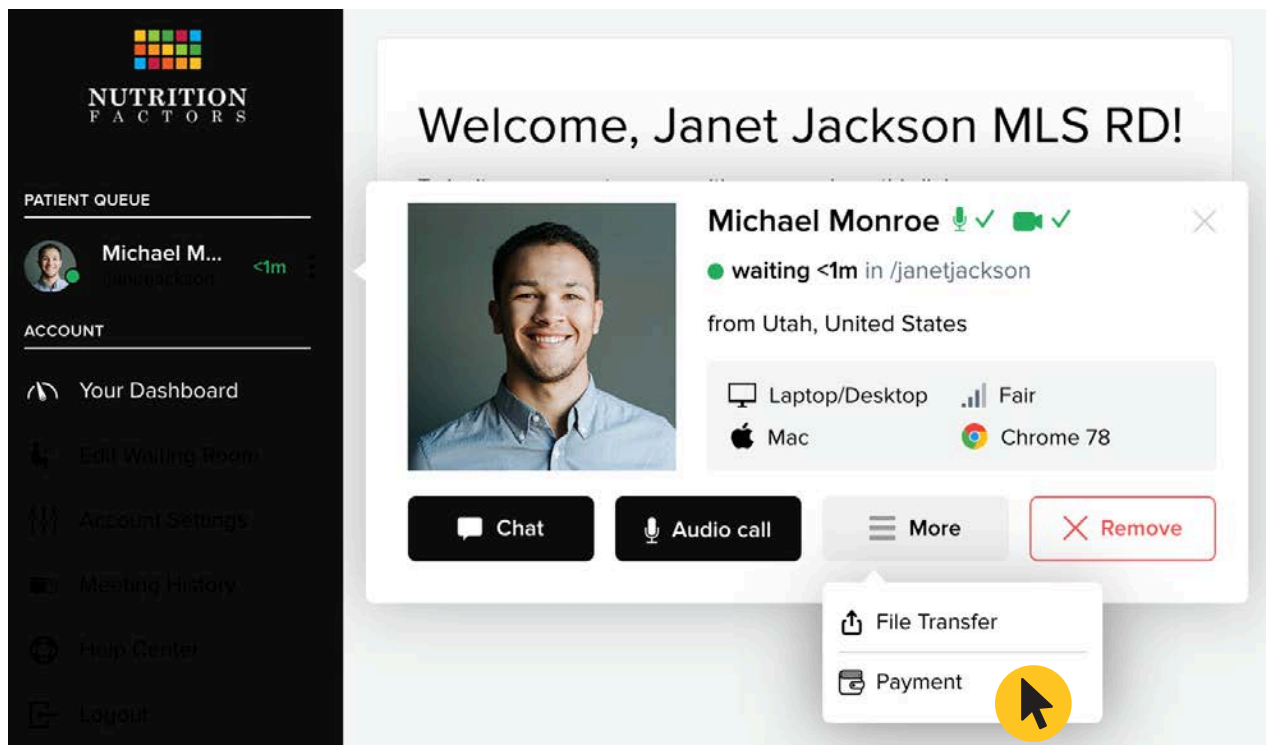
The file will show up in your default downloads folder.

## Collect Payments from Clients

The payments feature lets you accept credit card payments while on a call or from the waiting room. Once you link up your Stripe account, session payments and copay's become way easier.

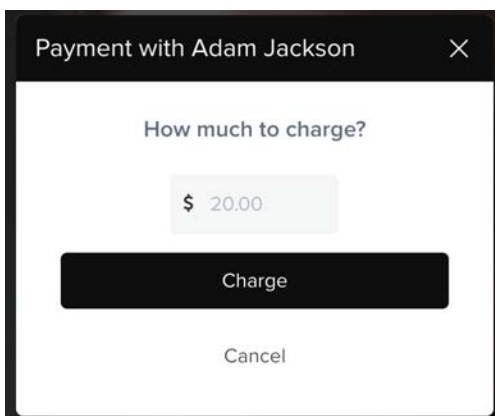
### To receive a payment from the waiting room:

Click the three dots in the patient queue > Select *More* > Enter the amount and click *Charge*  
Patient enters CC details and accepts the charge.



### To receive a payment on a call:

While on a call, click *Payment* on the left panel > Enter the amount and click *Charge*  
Patient enters CC details and accepts the charge.



#### Notes:

The first account transfer can take up to 7 days to show up in your account. After it will take around 2 business days to show up.

The fees associated with Stripe are 2.9% and 30 cents per transaction that Stripe takes out. (We don't charge anything above what they do).

## Set up Stripe

As you will be billing clients directly for your own fees and services, Stripe is required as the Credit Card Processor.

### Create your Stripe Account:

Visit [stripe.com](https://stripe.com) > Click *Start Now* > Create your Stripe Account

How do you wanted to get started? > Prebuilt solutions

### To link up Stripe account

Go to Account Settings in the dashboard > Select Extensions > Expand Payments > Select Connect with Stripe > Fill out the Account Details > Click Authorize access to this account

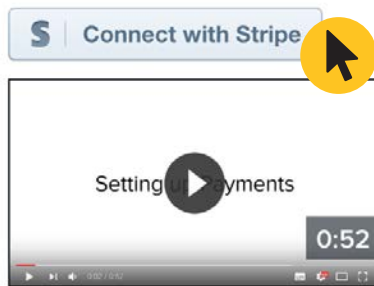


Payment

Collect payments directly from your patients

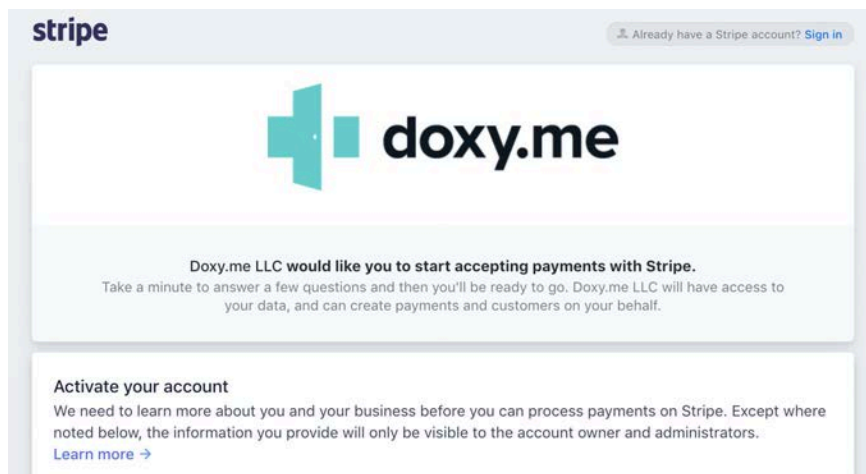
You are not ready to accept payments yet

Setup or link your Stripe account.



### Activate your Account

Fully activate your account by submitted your business information.



# 5 tips for a great experience

Choppy video can be frustrating during a video call. Fortunately, here are 5 tips that can improve call quality:

## 1 Restart your computer before a call.

Other software might be using computer power or interfere with your video or microphone. Restarting your computer will assure your computer is ready for video.

## 2 Use fast internet with ethernet cable.

Video quality adapts to internet speed, so the faster your internet connection, the better the video quality you will experience.

## 3 Use a newer computer with plenty of speed.

Sending and receiving video takes a lot of computer power. Old or slow computers will have a harder time processing the video, which can cause choppiness.

## 4 Use low resolution.

If you are experience poor quality, try lowering the resolution. By doing this it requires less bandwidth and computer power, resulting in less choppiness during your call.

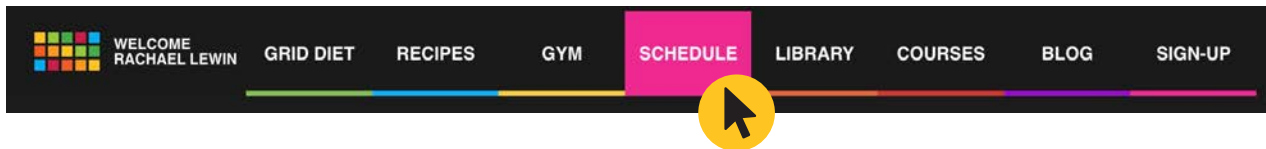
## 5 Use headphones.

Typically your computer will automatically eliminate echo or audio feedback so you don't hear yourself talking. But if it happens, have the participant and yourself use headphones.

These tips apply to both participants on the call.

# Schedule Link

Connect your favorite scheduling directly to Coaching Portal. This feature allows clients to schedule time directly from your Coaching website.



## Update your Schedule Link

Navigate to 'Your Name' Menu in top right corner > Select Profile > Select Set-Up/Edit Profile

Update the field with your new link > Save

Upload image\*  
Choose a file

First Name\* Rachael  
Last Name\* Lewin  
Email rachaelglewin@gmail.com

Phone\* (private - not visible to the public)  
Website Link (Full URL path including http:// or https://)  
Facebook Account

Instagram Account  
Pinterest Account  
Twitter Account

Youtube Account  
About Me\*  
Rachael Lewin is a Registered Dietitian, Certified Intuitive Eating Counselor, and Certified Personal Trainer with a private practice in Somerville, MA. She received her Bachelors of Science in Nutrition and Dietetics from Boston University and completed her Dietetic Internship at Oregon Health and Science University.

My Company  
Credentials Registered Dietitian, Certified Intuitive Eating Counselor, and Certifi  
Affiliate ID 19991

Telehealth Link https://nutritionfactors.doxy.me/rachaellewin  
Billing Link\* https://officeally.com  
Schedule Link https://calendly.com/rachaellewin  
User Name (Financial Center) rachaellewin

SAVE NEXT: GRID

## Pick your Schedule App

You can choose from a variety of 3rd party scheduling apps to connect to your Coaching Portal. Examples include Calendly, Acuity Scheduling, SimplyBook.me, 10to8, and Checkfront.

Once you have your Schedule Link, simply add it to your profile.



**“If you get, give.**

**If you learn, teach.”**

**- Maya Angelou**



# Start Coaching

Use our extensive resources to help you to get started with your Coaching Program.

## ■ *Role of a Coach*

Understand your role in the wellness journey. Use this guide as you get started to clarify best practices in supporting clients.

## ■ *Define your Coaching Program*

What do you want your Coaching Business to look like? Begin to detail your vision of your Coaching Program.

## ■ *Tips to Find New Clients*

Creating a steady stream of leads and prospects is vital to the health of your coaching business.

## ■ *Efficiently Manage Clients*

There are several key components to managing your clients in an efficient way.

## ■ *Step-by-step Coaching Guide*

This course was created as a walkthrough for coaches to teach clients correct principles and develop lasting habits.

## ■ *Coaching Forms*

Nutrition Factors provides basic coaching forms for you to use with your clients.

## ■ *Commissions and Fees*

Charge your own fees for programs and services you render.

# Role of a Coach

## What is a health coach?

Now that you have signed on to become a health coach at Nutrition Factors, you should be very excited about the important role you will be playing to help your clients achieve success in their weight loss and wellness goals. However, a lot of confusion surrounds what exactly a health coach is supposed to do. The intent of this article is to clarify that.

Your clients will probably look up to you as a mentor, but you need to be more than that. Your efforts can only succeed if your clients also recognize the need to change and are willing to set reasonable goals and then make a commitment to do what it takes to attain them. In order to facilitate these behavior changes, establishing good rapport is essential. You need to be attentive to each client's individual needs, strengths, and vulnerabilities, and tailor your approach accordingly.

Also, just as important as knowing what you can and should be doing as a health coach is knowing what functions you might like to perform but need to let other qualified professionals handle because they are outside your scope of practice. Much like a heart surgeon would not be called upon to perform a liver biopsy, there are certain things that a health coach is not qualified to do.

## A collaborative effort between the health coach and the client is essential

Here at Nutrition Factors before any health coach starts working with a given client, we require a signed agreement between the two parties regarding their respective roles and responsibilities. The agreement is to be based on a mutual understanding as to why the health coach is being brought in to help and what kinds of services the health coach will be performing to facilitate the client's progress in achieving and maintaining a healthier weight and lifestyle.

## Use your own good communication skills as the catalyst to empower your clients

The American Council on Exercise, which offers a health coach certification program, emphasizes these three ways well trained health coaches can make a difference.  
<https://www.acefitness.org/educationand-resources/professional/expert-articles/5400/the-role-of-a-health-coach-and-behavior-changespecialist>

The ACE approach, which we endorse, is not about prescribing a set regimen for weight loss or giving clients an explicit set of instructions. It is about helping clients become more proactive in developing healthy eating habits and lifestyle changes.

- Use effective communication skills like asking open-ended questions and listening to and summarizing what the client is saying.
- Rather than tell your clients what they need to do differently, ask them what types of changes they want to make. Then encourage them to develop achievable and measurable goals with which they can monitor their progress along the way and be motivated to continue.
- Encourage clients to recognize and use their own strengths to facilitate successful behavior changes.

## **Other things the Health Coach can and should do**

Here, more specifically, are five different ways you as a health coach can contribute to your clients' success.

### **1. Use a client-centered approach.**

Make a conscious effort to be client-centered both in your language and methodology. Your job is to help your clients establish and implement appropriate wellness goals themselves, not to do it for them. Keeping that in mind will help you avoid possible service focused issues.

### **2. Give your clients the information they need to make better decisions regarding their health.**

The task of setting goals and deciding on a carefully thought out plan of action in order to achieve them rests with the client, not the health coach. However, knowledge is power. What the health coach can and should do is provide educational resources and ask thought provoking questions that can help the client distinguish realistic, achievable goals from impossible ones and determine a workable plan.

### **3. Connect your clients to other agencies that can help them.**

Recognize when a client has health issues or other problems that other professionals may be better equipped to handle. Depending on individual needs, you could be doing that person a big service by making a referral to an outside organization such as Overeaters Anonymous, the American Diabetes Association, or Assistance for the Handicapped, just to name a few.

### **4. Empathize with your clients.**

Making excuses for gaining excess weight is easy but admitting that that the only way to lose the weight successfully and keep it off is to be willing to change one's own behavior and eating habits takes strength and courage. So, put yourself in your client's shoes. When the going gets tough, offer emotional support. The last thing you want is for your client to feel like a failure and quit, which has probably happened multiple times before. So avoid being judgmental. Acknowledge even small accomplishments with praise.

## **5. Establish a cooperative working relationship with the client's medical professionals.**

Nutrition is closely related to every other aspect of a person's health. Not only are many medical problems caused by or exacerbated by poor diet; based on the individual's state of health and already existing medical conditions or food sensitivities, the daily diet may need to be adjusted accordingly.

Furthermore, in the process of losing weight, significant changes could occur in many aspects of bodily functioning, such as blood pressure, glucose level, metabolism, and electrolyte balance, possibly calling for an adjustment in medication. For all of these reasons, anyone needing to lose 10 pounds or more and/or planning to significantly increase the amount of exercise needs to have complete physical checkups and appropriate lab tests both before and during the weight loss process. In addition, the nutrition program needs to stay informed about the dieter's state of health just as that person's medical practitioners need to be on board with the weight loss plan.

As a health coach, you can facilitate your clients being able to get the best possible medical care. You can start by taking your client's medical history and sharing it with the client's doctors, dietitian, personal trainer, and psychologist. As long as you refrain from trying to diagnose or treat any client's medical problems yourself, you are within the bounds of your profession to ask when the last visit to a doctor was and when the next one will be. It is perfectly fine to recommend regular physical checkups, additional checkups to address any new health concerns, and keeping all scheduled medical appointments.

### **The Five Primary Topics to Cover in Health Coaching Sessions [weight loss, nutrition, Fitness, stress management, general health]**

Here at Nutrition Factors before any health coach starts working with a given client, we require a signed agreement between the two parties regarding their respective roles and responsibilities. The agreement is to be based on a mutual understanding as to why the health coach is being brought in to help and what kinds of services the health coach will be performing to facilitate the client's progress in achieving and maintaining a healthier weight and lifestyle.

### **Use your own good communication skills as the catalyst to empower your clients**

As a health and wellness coach, your job is to view your client's health from a holistic perspective. Yes, your clients want you to help them lose weight, but the discussions you have with them should not only be about weight loss, but also nutrition, fitness, stress management, and general health. Health coaches are in an ideal position to help their clients address the various components of their lives that have kept them from thriving physically, mentally, and spiritually and give them the needed tools to make lasting changes.

Any of the following wellness goals can serve as the basis for a very helpful coaching session.

- Losing weight
- Quitting smoking
- Reducing stress
- Improving interpersonal relationships and your own self-image
- Eating better and more mindfully
- Achieving better work-life balance
- Increasing life satisfaction
- Setting personal goals and following through
- Stretching your mind to adjust your perception of yourself
- Prioritizing self-care
- Balancing wellness with a busy schedule
- Erasing negative thinking and substituting a positive mindset

As a certified wellness coach, you're in a great position to serve as an accountability partner for your clients. From day 1 and for as long as they're in the program, you can offer them inspiration and guidance. But also assure them that you will still be in their corner to encourage them when they feel like giving up. With a wellness coach at one's side, setbacks are temporary, not permanent.

## **What a Health Coach Cannot Do and Should Not Attempt to Do**

Fulfilling your role as a certified health coach by following the above guidelines can go a long way towards maximizing your clients' chances of success. However, of equal importance is being thoroughly knowledgeable about and willing to recognize what you are not allowed to do.

All of the following functions are outside the scope of what a health coach can legally do.

- Perform therapy
- Assess nutritional needs
- Plan specific menus
- Recommend, prescribe, or sell nutritional supplements
- Assign specific exercises
- Evaluate lab results
- Make any medical or mental health diagnoses or prescribe treatment

- Engage in any other practices or activities in which the health coach lacks the proper training or credentials as stipulated by professional standards or law.

Refraining from doing what is clearly outside the scope of a health coach's duties is extremely important. Engaging in such practices and actions could place a client's health and safety in jeopardy as well as result in disciplinary action and litigation being taken against the coach.

Nutrition Factors takes strict adherence to appropriate professional conduct on the part of all health coaches very seriously and will not tolerate any infractions.

## **A Health Coach is Not the Same as a Dietitian**

We also want you to know that you are part of a team of professionals, each of whom brings different skills, background, and expertise to the table. Many people might think the terms health coach and dietitian are interchangeable, but they are not. That is why at Nutrition Factors, every health coach is assigned to work under the direction of a registered dietitian.

As a health coach, you can act as a guide to making good food choices and adopting a healthy lifestyle. But what you cannot do is prepare actual menus for your clients to follow.

Thus, for example, you can show a client how to use the Grid Diet, but you cannot choose the specific foods for each meal. In fact, many states have specific regulations regarding who is legally authorized to prepare individualized menu plans.

## **A Health Coach is Not Qualified to Diagnose or Treat Medical Conditions or Psychological Problems Either**

As for any coexisting medical conditions or psychological problems, a health coach can offer general guidelines pertaining to healthy eating and lifestyle. However, dispensing medical advice, diagnosing disorders, and prescribing or administering treatment for a perceived medical or psychological problem are clearly outside the scope of what a health coach is allowed to do.

It is imperative for all health coaches to recognize their limitations and wherever appropriate, refer a client to a duly qualified licensed physician, mental health professional, or other member of the medical profession who is best equipped to address the problem.

## **Know and Abide by the Specific Laws in Your State and Those of Your Clients**

While the above guidelines apply to all health coaches, some individual states have their own specific regulations with regard to what is and outside the legal domain of a health coach. Some states are more restrictive than others. Therefore, it is your responsibility to understand the licensure laws of your state and not offer any services outside the scope of practice for health coaches in your state. However, your best recourse is to have a clear understanding not only of your own state's laws, but also the laws in your clients' states. If you are serving clients in different states from your own, you are responsible for knowing and abiding by the laws applicable to health coaches in each of those states, too.

As a start, here is map from the Center for Nutrition Advocacy which allows you to see at a glance the legal parameters for health-related professionals in each state. <http://www.nutritionadvocacy.org/laws-state> However, we cannot emphasize too strongly that you should use this information as a guide and not as a substitute for legal counsel.

Another excellent way to protect yourself is to include a lawyer approved disclaimer on your website, client agreement forms, social media, and other marketing material. The purpose of the disclaimer is to clarify for your clients what your services will and will not include and provide legal protection against breach of contract. However, we strongly advise you to consult a lawyer familiar with the health coaching field to make sure the disclaimer is worded correctly and is legally binding.


You should also obtain legal assistance in drawing up the personalized written agreement forms between yourself and each of your clients. A single standardized agreement form for all clients will not suffice. Since each client brings a different set of problems and needs to the table, the agreement between the two of you needs to reflect those individual differences, as they relate to your role as a health coach.

Research studies have clearly shown that having a health coach can be very beneficial in facilitating behavior changes conducive to a healthier lifestyle. Given that the United States is now experiencing an epidemic of obesity, diabetes, and other diseases related to poor nutrition and physical inactivity, health coaches can play a vital role in helping to combat the problem.

However, you need other qualified professionals who are part of the same team to help you. Here at Nutrition Factors, in addition to requiring you to work with and report to the experienced registered dietitian assigned to you, we are putting other valuable resources at your disposal. We have partnered with a personal trainer and with a carefully selected group of physicians to whom you can refer a client who might be able to benefit from their services.

We encourage you to utilize this network of professionals available to you. There is no better way to have a positive impact on your clients' health than for qualified individuals from different professions to be working together while staying within the scope of each contributor's individual training, experience, and credentials.

Unfortunately, there is no single nationally accepted definition of what the job of health coach entails. This means that the best we can do here is provide helpful guidelines. The scope of practice for a health coach ultimately depends on the states where the person is working and their statewide policies and regulations.



**“You never know when a moment  
and a few sincere words can  
have an impact on a life.”**

**- Zig Ziglar**



# Setting up your Coaching Business

As an Independent Coach you will want to begin your coaching career by setting up your business and defining your coaching program.

To help you get started, we have created a resource-library to help guide you through the process. We have also created various helpful forms, questionnaires and checklists for you to use.

Forms can be found at

***[partners.nutritionfactors.com/resource-library](https://partners.nutritionfactors.com/resource-library)***

*Forms found within the Resource Library:*

- Role of the Health Coach
- Defining Your Business
- Setting Up Your Business
- Client-Coach Agreement
- Professional Liability Insurance
- Telehealth and Your Practice

# Define your Coaching Program

## *Define your Focus*

The first step to defining your coaching program begins with knowing what types of programs you are qualified to offer that is within your scope of practice. Your program offering will be based on your education, scope of practice, experience, and interests.

## *Education*

What are your credentials and scope of practice? If you don't already know what your credentials qualify you for in the counseling world, we suggest that you check with your local or state government agency to insure that you stay within the laws and regulations of your credentials. You can also discuss your credentials with the school or certifying agency that you received your credential from to confirm your scope of practice.

## *Experience*

As you consider your program's curriculum, ask yourself what experience do you have that qualifies you in your area of expertise? What have you learned that you can teach others? What is your expertise?

## *Interests*

Your interests are your passion. What are your passions and what motivates you to coach others? Are you interested in fitness, nutrition, basic wellness or are you qualified to do Medical Nutrition Therapy?

## *Areas of Practice*

Ideas for areas of practice are endless and varies depending on the coach's interests and credentials. List is non-inclusive:

- General Nutrition
- Healthy Eating Habits
- Weight Reduction
- Obesity treatment
- Holistic Health
- Functional Medicine
- Meal Planning
- Meal Prep
- Food Demonstrations
- Employee Wellness Counseling

- Community Wellness
- Disease Prevention
- Prediabetes
- Diabetes
- Different Types of Diets
- Cardiovascular Health
- Gut Health
- Fitness
- Bodybuilding
- Personal Training
- Sports Training
- Behavioral Modification
- Stress Reduction
- Habit Cessation

### *Define your Program*

Begin to define your Coaching Program. Take the time to reflect on the following questions:

What are your personal coaching fees?

How does this change with each client?

How long is your program?

How long is each session?

How many types of programs will you offer?

Do you plan on beginning with a wellness assessment?

Outline your Coaching Program into sessions

Will you offer seasonal programs and challenges?

How will you bill your fees?

Will you bill your fees directly through the telehealth portal?

Will you accept insurance?

Do you have an NPI number to bill insurance companies?

Will you offer handouts or other helpful materials?

Will you give accomplishment badges or a completion certificate?

## *Outline your Program*

Define your Coaching workflow. Personalize your coaching sessions to meet your client's needs. Use the checklist below as a guide.

### *Preparation and Paperwork*

- Sign Client/Coach Agreement
- Define Relationship and Responsibilities
- Gauge Commitment Level and Readiness

### *Health Assessment*

- Health Assessment and Discovery
- Document allergies, food intolerance, health or health risk problems, limitations, weaknesses and strengths

### *Coaching Sessions*

- Preparation and time management of sessions
- Define Agenda
- Co-Create Action Plan
- Coach Clients on how to use Tools
- Questions
- Set Goals and Challenges
- Reaffirm with positive statements
- Document Session Progress

### *Evaluation and Follow-up*

- Client Evaluation
- Closing Statements
- Coaching Program Termination



**“Any program is only**

**as good as it is useful.”**

**- Linus Torvalds**

# Tips to Find New Clients

Creating a steady stream of leads and prospects is vital to the health of your coaching business. How are you going to attract and secure new clients? Use these five tips to generate ideas.

## ***1. Find Speaking Engagements***

A smart way to get people to be recognized for your expertise is to put yourself on stage. Experience doesn't matter. The stage and/or microphone will give you instant credibility as a presenter or host.

Setting up an event isn't as hard as you think. It's simply a matter of choosing a topic, finding a venue, and spreading the word about it.

Limited or no budget? Use free resources such as Eventbrite or Meetup to organize and promote your event.

*Finding speaking engagements at:*

- Conventions
- Professional organizations
- Group meetings
- Charities
- Local businesses
- High Schools, Colleges and Universities
- Trade Shows
- Gyms and Fitness facilities

## ***2. Partner with Businesses and Groups***

Partner with businesses that overlap with your client target audience. Incentive them to work with you through by offering your expert services, sharing commissions, and doing giveaways.

*Potential Business and Groups:*

- Gyms/ Rec Centers
- Life Coaches
- Wellness centers
- Spas
- Physician Offices
- Churches
- Yoga studios
- Personal training facilities
- Health Food stores
- Massage studios
- Physical therapy providers
- Social Media Groups
- Pilates studios
- Holistic practitioners
- Local Newspapers and media channels
- Running Groups
- Chiropractors offices

### ***3. Employee Wellness Programs***

Businesses are already looking to establish Employee Wellness Programs to combat productivity loss linked to absenteeism. Approach large and small businesses regarding their Employee Wellness Program. Identify and contact Human Resource/ Benefit Specialists as the primary contact in charge of their company's Wellness Program.

*Find Employee Wellness Partners:*

- Local Businesses
- Neighborhood Groups
- Chamber of Commerce
- Women's and Men's Associations
- Insurance Companies

### ***4. Share your Expertise in Facebook Groups***

A Facebook Group is a place for group communication and for people to share their common interests and express their opinions. You can use Groups to identify niches to target the right audience. Over time, as you proactively provide value, you will be seen as the go-to person for your area of expertise.

How to make it work for you:

#### ***1. Make a list of relevant Facebook Groups***

Explore multiple Facebook Groups in a variety niches. Focus on the groups that have high member engagement. Move on from Groups with limited or no engagement.

#### ***2. Consistently Add Value***

Be active. Answer people's questions. Proactively offer tips and advice to help others achieve their goals. Understand that your posts will be seen by more than just the person with whom you are conversing. In some cases, many, many more.

#### ***3. Seize Opportunities to Connect Outside of the Group***

As you give freely of your expertise, opportunities will present themselves to move from discussion beyond the Group and into private Coaching Sessions. This can be done through private messages, external links, and webinar invitations.

# Efficiently Manage Clients

There are several key components to managing your clients in an efficient way.

## ***1. Time Management***

Set a work schedule and stick to it. Determine how much time you are going to spend with each client, and how many clients you can see in a day. Factor in session, preparation, review, evaluation and follow-up time. Each session should be carefully planned out in 5-10 minute increments. Allow enough time between clients to stay on track, [should your session run overtime]. Document and keep track of your time. Know how many hours you are working each day. Divide your time appropriately between marketing your services, preparation and actual coaching sessions.

## ***2. Be Prompt***

Start sessions on time and end sessions on-time. Keep all appointments. Only cancel appointments if absolutely necessary. Give the client enough time and options to reschedule in a timely manner.

## ***3. Set Boundaries***

Set boundaries with clients. Clients should understand that your time is valuable and limited. Establish a reasonable time schedule to return a call or text from a client. You should not be at the client's beck and call 24/7.

## ***4. Build a Client List***

Keep an ongoing list of current, past and future clients. Document where the client is at in the process.

## ***5. Organization***

Keep your workspace and files well organized.

## ***6. Prioritize***

Divide tasks into categories such as urgent, non-urgent and important. Work on urgent tasks and time sensitive tasks first



### ***7. Follow a Client Session Checklist***

Checklists help you stay on track with time management and coaching sessions. See resource library for checklist

### ***8. Be Productive***

Use your time to be productive. When you are working, eliminate distractions such as looking at social media, talking on the phone, doing other jobs that are unrelated. Being busy might not equal productivity.

### ***9. Personal Health Information***

Store client's personal health information only on platforms that are secure and HIPAA compliant. If downloading to your personal computer, password protect your computer, encrypt files, and lock files in a secure file cabinet. Maintain strict confidentiality at all times.

### ***10. Stay on Track***

Prepare an agenda prior to each session. Follow an outline. Stay on track with the coaching session. If the client gets off track, bring the client back on topic.

### ***11. Notes and Documentation***

Document, document, document all sessions. Good documentation and charting are keys to successful coaching. Fill out a Factors form and a "to do list" after each session.

### ***12. Be Attentive and Kind***

Know your clients needs, be alert and prepared in every session. Develop a good rapport and tone with the client. Do not bring your personal problems into any session. Avoid being judgemental, but rather understanding of the client's situation. Listen to understand.

### ***13. Stay Within Your Scope of Practice***

Knowing when to refer a client to a different professional is important. Your job as a coach is to guide the client into making good decisions and help them accomplish the goals they have set. It is not your job as a coach to diagnose, treat or cure. If your clients asks you to do so, refer them to their personal physician or other health coach professional.

# Step-by-Step Coaching Guide

Nutrition Factors provides a coaching guide to each coach and a guide for each client. The coaching guide is located inside your coaching portal under courses. The coaching guide is an extended version of the client's guide. The guide is a good resource to keep you on track in an organized manner with topics to discuss with your clients. Clients can also refer back to the guide at a later time to reiterate past coaching sessions.

Nutrition Factors understands that each coach may have their own program offerings and that coaching programs will vary depending on the coach's speciality. However, for newer coaches, a guide has been provided. Primarily the guide is focused towards weight loss and healthy eating. The guide is divided into eight (8) modules with each module consisting of 5-10 units.



## ***Getting Started with the Coaching Process***

Every new journey and goal has a starting point. The coach should teach the importance of pre-framing the client's mind for success. If the client's mind is not ready for success, the client will most likely not follow through which leads to failure. Attitudes and thought processes are very powerful saboteurs that can derail action and progress quicker than any other variable. The coach needs to determine which stage of change the client is in to best guide them to success. This module will take the coach and client through the steps of beginning their journey, statistics, choices, thoughts and attitudes, setting goals, developing an action plan and the health benefits they will receive if they follow a structured plan and develop good health habits.



## ***Assessment***

Each client has their own unique health challenges, with varying nutritional and energy requirements. Conducting a health assessment is the beginning point for discovery and getting to know your client. The assessment time is a time to determine where the client currently is at and what goals the client would like to accomplish. The coach discover what motivates the client and which triggers activate unhealthy behaviors or relapses. This module covers assessment, screening, anthropometric data, personal requirements, personal history, medications, and supplements.



## ***The Plan***

Once personal goals are set and the discovery phase is over, it is time to move onto the action plan. The coach should help the client set an action plan and get started. This module will help the client set an action plan, learn the Nutrition Factors Grid Meal Planner, choose healthy foods, and import pre-designed meal plans.



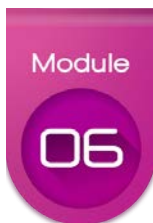
### ***Physical Activity***

Nutrition and exercise go hand in hand. Therefore, we have added a module on the importance of fitness. In this module clients will learn to power-up, burn fat, and use the NF Gym APP.



### ***Nutrition***

The nutrition module is made up of 10 units that cover the following topics; fuel your body, eat wisely, hidden priceless treasures, carbohydrates, fats, protein, water, caloric density, and developing a nutrition plan that works for the client. The client will learn to eat wisely, make good food choices and, most importantly-balance meals with the proper ratio of macronutrients to minimize the hormonal response to food. Food can be used to an advantage to lose fat, restore energy and reverse health risks.



### ***Biological Factors***

This module covers the hormones that store fat and hormones that mobilize the fat out of the cells to be burned as fuel. The client will learn how to get their body into fat-burning mode and when the best time to eat is for fat burning. This module covers metabolism, hormones, hormonal response to food, cravings, and reprogramming the metabolism.



### ***Behavioral Modification***

Have you ever stopped to think you may be your own worst enemy? Habits and thoughts may be keeping your client from living their best life possible, and contributing to health risks such as obesity and diabetes. In this module clients learn how to improve behavioral and eating patterns by rethinking and reprogramming their thought processes. Client's will also learn what triggers poor health habits. Units includes; habits, dysfunctional thinking, barriers to change, and accountability.



### ***New Life-New Habits***

This module covers the end goal of achieving goals, which leads to the maintenance phase. The end-goal is the big prize which consists of a new life, staying strong, cycles and ongoing support.

# Coaching Forms

Nutrition Factors provides basic coaching forms for you to use with your clients. Feel free to download the forms and add your own logo.

Forms can be found at

***[partners.nutritionfactors.com/resource-library](https://partners.nutritionfactors.com/resource-library)***

*Forms found within the Resource Library:*


- Food Likes and Dislikes
- Begin Your Journey
- Statistics
- Choices, Thoughts, and Attitudes
- Goals
- Measurement Chart - Male
- Measurement Chart - Female
- Progress Report - Factor Tracker
- Wellness Assessment Questionnaire

# Your Coaching Fees

Charge your own fees for programs and services you render. Instant bill directly from your telehealth portal.

If you plan on setting your own fees and bill through the telehealth platform, a Nutrition Factors staff member can assist you in setting up a merchant service account through Stripe.

Email us at [contact@nutritionfactors.com](mailto:contact@nutritionfactors.com)



**“Growth is never by mere  
chance; it is the result of  
forces working together.”**

**- James Cash Penney**

# Expand your Business

Grow your business past personal coaching. Discover the many ways you can drive revenues through your Nutrition Factors Coaching Business.

## ■ ***Pathways to Success***

Understand the many ways of how you can be successful with your Nutrition Factors Coaching Business.

## ■ ***Coaching Partner Affiliate Program***

In addition to using the platform to manage your coaching business, you can earn extra income by participating in our *Coaching Partner Affiliate Program*.

## ■ ***Build your Team***

Supplement your strengths and weaknesses by surrounding yourself with talented wellness professionals.

## ■ ***Employee Wellness Programs***

Help organizations with workplace wellness incentives to give employees access to meal planning, fitness training, and continuous wellness education

## ■ ***Business Portals***

Help organizations drive additional revenues by partnering with our nutrition, fitness, and wellness platform.

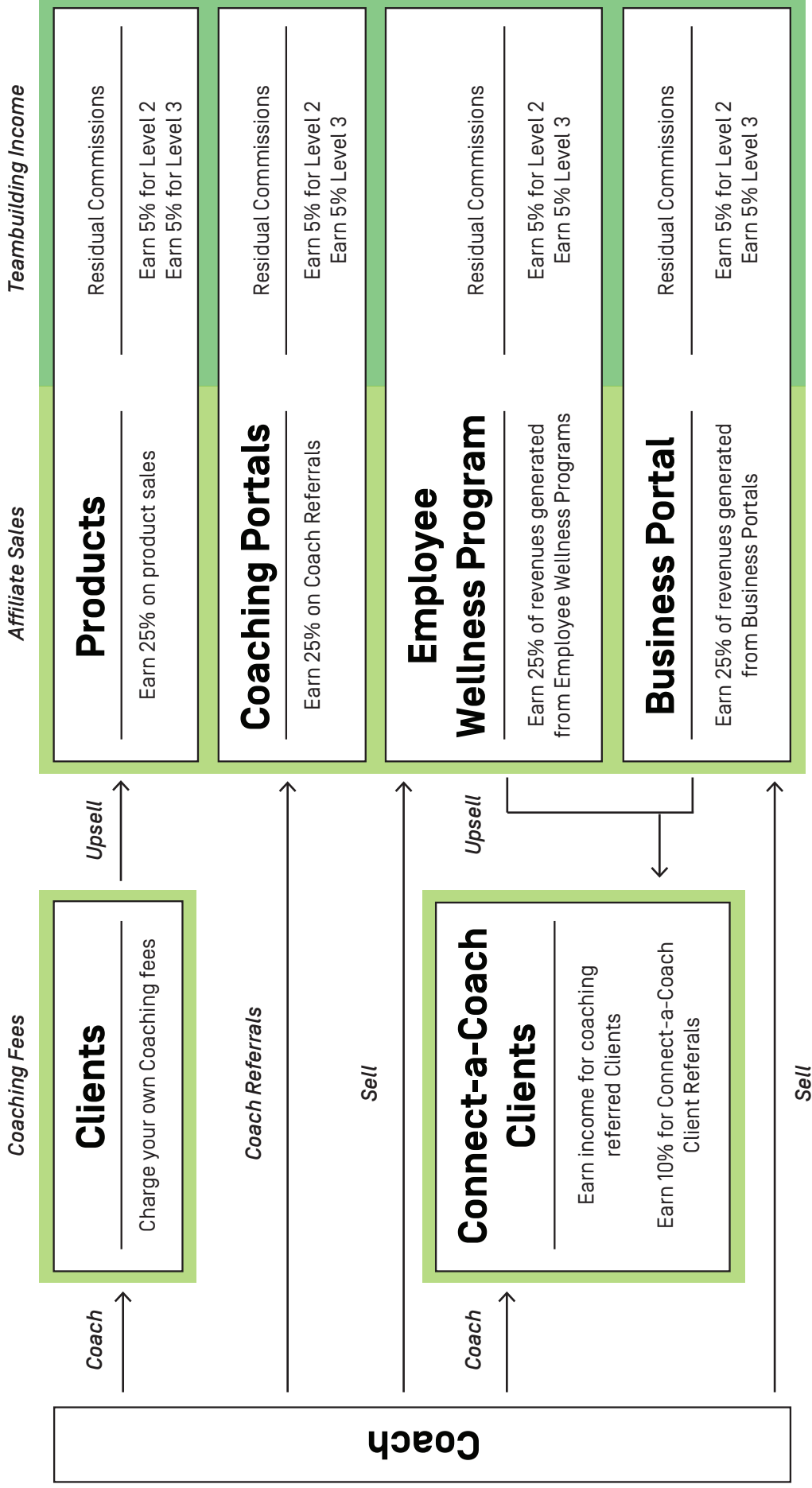
## ■ ***Connect-a-Coach***

Connects clients with approved Coaching Partners.

## ■ ***Professional Trainings and Certifications***

Expand your skillset to better help individuals achieve their wellness goals.

# Pathways to Success





# Partner Affiliate Program

In addition to using the platform to manage your coaching business, you can earn extra income by participating in our *Partner Affiliate Program*. Earn monthly commissions on coach memberships [recurring revenue], product sales, or Coaching Portal purchases.

Network with other Coaches and see your business income grow. Affiliate commissions are paid three levels deep. Build a residual income by enrolling other coaches to benefit from their memberships, product sales, and Coaching Partner referrals.

## ***Affiliate Commissions Table***

Paid Level		Commissions
Your Sales	→	25%*
Level 2	→	5%
Level 3	→	5%

\*Receive 5% Bonus on Full Year Membership Sales

## ***Commissions***

Coaches can earn monthly income through our affiliate program by selling Nutrition Factors monthly subscriptions and products. Affiliate commissions are paid three levels deep. Coaches earn a 25% commission on orders placed by their direct clients, 5% by Level 2 clients, and 5% by Level 3 clients.

Receive a 5% bonus on Full Year Membership Sales.

## ***Commissions Payout***

Commissions are paid out monthly on the 15th of each month.

# Build your Team

Supplement your strengths and weaknesses by surrounding yourself with talented wellness professionals. Start by making a list of traits and qualities you would love to see join your coaching team. Then keep an eye open for potential team member that fit your descriptions.

## *Traits and Qualities*

Make a list of traits and qualities you would love to have on your team:

[Ex. expertise, positive attitude, hardworking etc.]

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## *Get Started with Recruiting*

Don't wait for the perfect time to start recruiting - that time is now. Begin to identify and reach out to potential coaches that fit your team member descriptions.

### **Reconnect with your Network**

Create a list of people from your different professional and coaching circles: known coaching professionals, current and former colleagues, classmates, etc. Invite them to get to know Nutrition Factors.

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### **Identify new Coaches**

Attend industry events, connect online via social media, forums, and networking events.

## Memory Jogger

### Professional Network

Colleagues  
Former co-workers  
Former associates  
Former classmates  
Former teachers  
Current address book  
Business cards list

### Social Network

Email Contacts  
Cell phone contacts  
LinkedIn  
Facebook  
Twitter  
Instagram

### Family and Friends


Family  
Extended Family  
Friends  
Neighbors  
Church Members

### Health and Wellness

Clients  
Dietitians  
Nutritionists  
Healthcare Practitioner  
Nurse  
Hospital Staff  
Wellness Providers  
Holistic Providers  
Chiropractors  
Acupuncturists  
Massage Therapist  
Gym Owners  
Gym Staff  
Fitness Coaches  
Personal Trainers  
Health Coaches  
Physical Therapist  
Therapist  
Group Instructor  
Workout friends  
Spa Owners  
Yoga Instructors  
Pilates Instructors  
Workout friends

### I know someone who...

is physically active  
is actively looking for part-time job  
is ambitious  
is enthusiastic  
is entrepreneurial  
is good with people  
is a caring person  
is a champion  
is fun  
is friendly  
is goal-oriented  
is a natural leader  
lives a health lifestyle  
loves a challenge  
loves to learn new things  
is organized  
is a positive-hinker  
is self-motivated  
is a single mom/ dad  
is a team Player  
doesn't like their job  
has children in college  
just graduated  
just quit their job  
wants to help their spouse retire early  
wants more time with their families  
wants to work for themselves

A smiling woman with long blonde hair, wearing a white button-down shirt, is holding a roll of black yoga mat. The image has a green overlay. The quote is displayed in white text on green rectangular backgrounds.

**“The groundwork of all  
happiness is health.”**

**- Leigh Hunt**

# Employee Wellness Program

The *Nutrition Factors Employee Wellness Program* helps organizations with workplace wellness incentives to give employees access to meal planning, fitness training, and continuous wellness education as well as a connection to our community of Dietitians, Nutritionists, Health Coaches, Fitness Trainers, Holistic and Wellness Providers.

Programs are overseen by a Employee Wellness Health Coach assigned to assist in program setup, employee wellness training, and potential one-on-one Coaching Sessions.

## *Key Features Include:*

### **Nutrition and Meal Planning**

- 7 Day GRID Meal Planner
- Database of Prepared Meal Plans
- Recipe Database
- Weekly Meal Plans
- Meal Prep Guide
- Shopping List and Grocer Links
- Nutrition Factors Library
- CDC Diabetes Prevention Program

### **GRID Gym Fitness App (Add-on)**

- Online Coaching for Individualized Workout Plans
- Virtual Personal Trainer w/ over 4500 Exercises
- Activity Tracker
- Body Composition Monitor

### **Connect-a-Coach (Add-on)**

- Connect to Personal Health Coach

## *Target Audience:*

- Local businesses
- Chamber of commerce
- Insurance Companies
- Neighborhood groups
- Women's and Men's Associations

# Benefits of Healthy Employees

*Keep employees healthy and productive with an interactive wellness program.*

The Centers for Disease Control and Prevention (CDC) reports that “productivity loss linked to absenteeism costs employers \$225.8 billion annually in the United States or **\$1,685 per employee per year**. The known culprits are chronic disease, fatigue, aging workforce, obesity, stress and depression, of which all affect the employer’s revenue.”

## Five Reasons Employee Wellness is worth the investment

1. Healthy, active employees incur lower health costs and decreases absenteeism
2. Employees who take advantage of wellness are more productive
3. Physically active employees are healthier
4. Wellness programs inspire important behavior changes
5. Small business owners may be able to take advantage of tax incentives for workplace wellness programs.


[1] <https://health.gov/news/blog/2017/05/five-reasons-employee-wellness-is-worth-the-investment/>



# Program Costs and Fees

*Contact Nutrition Factors for latest program costs and fees.*



A collage of health and fitness items including fruits, dumbbells, and a measuring tape. The items are arranged on a dark green, textured background. There are several fruits: a green apple in the top left, a yellow-orange fruit in the top center, and a green apple in the bottom left. There are also dumbbells: two pink ones in the center and two yellow ones in the bottom right. A yellow measuring tape is coiled in the top right. A clear glass bottle is partially visible on the left side.

**“Money is the most envied,  
but the least enjoyed.  
Health is the most enjoyed,  
but the least envied.”  
- Charles Caleb Colton**



# Business Portal

The *Nutrition Factors Business Portal* helps organizations drive additional revenues through our nutrition, fitness, and wellness platform. Allow fitness and gym members access to weekly meal plans, personalized workout programs as well as a connection to our community of Dietitians, Nutritionists, Health Coaches, Fitness Trainers, Holistic and Wellness Providers.

Programs are overseen by a Nutrition Factors Coach assigned to assist in program setup, coach training, and potential one-on-one Coaching Sessions.

## *Key Features Include:*

### **Nutrition and Meal Planning**

- 7 Day GRID Meal Planner
- Database of Prepared Meal Plans
- Recipe Database
- Weekly Meal Plans
- Meal Prep Guide
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- Activity Tracker
- Body Composition Monitor

### **Connect-a-Coach (Add-on)**

- Connect to Personal Health Coach

## *Target Audience:*

- Gyms/ Recreation Centers
- Yoga and Pilates studios
- Spas
- Physician Offices
- Physical therapy providers
- Wellness centers
- Holistic practitioners

# Unlock New Revenue Potential

*Boost revenue by connecting fitness to nutrition and wellness.*

Drive new revenue potential through new nutrition and wellness services. With Nutrition Factors, gyms are able to increase monthly fees and offer individualized coaching plans for nutrition while bettering the member's gym experience.



## ***New Recurring Revenues***

Charge \$9.99 to \$14.99 / month for member access to new nutrition and fitness services. You have the flexibility to charge your own fees.



## ***Personalized Nutrition Coaching***

Use your trainers or tap into our community of coaches to expand your nutrition services. Charge additional fees for member specific needs.



## ***Increase Member Engagement***

Nutrition Factors tools can be accessed anywhere, anytime allowing members to stay connected to your gym at all times!



# Program Costs and Fees

*Contact Nutrition Factors for latest program costs and fees.*



# Connecting Coaches to Clients

***Connect-a-Coach*** connects Nutrition Factors Clients with approved Coaching Partners.

The Connect-a-Coach Membership includes an initial health assessment, 30-minute weekly coaching sessions, access to 7 Day GRID Meal Planner and GRID Gym App, and video trainings on how to personalize meal and workout plans.

This membership is designed for clients who need help getting started or want additional guidance and ongoing help to maintain a healthy lifestyle. Maintaining a healthy weight and life balance can be tricky. Connect-a-Coach can help.

*Connect-a-Coach Key Features Include:*

## **Personal Online Coaching**

- Personal Health Coach
- Health Assessment
- 30-minute weekly coaching sessions
- Telehealth Video Chat

## **Nutrition and Meal Planning**

- 7 Day GRID Meal Planner
- Database of Prepared Meal Plans
- Recipe Database
- Shopping List and Grocer Links
- Meal Prep Guide

*Target Audience:*

- Gyms/ Recreation Centers
- Physical therapy providers
- Yoga and Pilates studios
- Wellness centers
- Spas
- Holistic practitioners
- Physician Offices

# Connect-a-Coach Expectations

*Use weekly check-in points to provide motivation and guidance to help stay on track.*

The Connect-a-Coach's primary function is to guide the client through their weight loss journey with structure, expertise, and accountability. Though Coaching Sessions are expected to be customized to the individual's needs, Nutrition Factors offers guided materials, forms, and trainings to ensure coaching best practices.

## **Expectations**

- Connect-a-Coach Training Program
- Professional Standards
- Health Assessments
- Weekly Coaching Sessions
- Add Meal Plans and Recipes to Database
- Record Keeping



# What's in it for you?

## *Refer Clients to the Nutrition Factors Community*

Have more clients than you can handle? Connect into the Nutrition Factors community of Health Coaches and receive 10% commission for each client referred to Connect-a-Coach.

## *Earn additional income for coaching Nutrition Factors Clients.*

Find new clients can be difficult. As a Connect-a-Coach, you earn additional income by coaching referred clients through our guided coaching program.



# Commissions

*Contact Nutrition Factors for latest Connect-a-Coach commissions.*

# Professional Trainings and Certifications

*Expand your skillset to better help individuals achieve their wellness goals.*

Nutrition Factors holds key partnerships to offer professional trainings for accredited and approved certifications to increase your nutrition, fitness, and wellness knowledge.



## ***Health Coach Certification***

As an HCCA Certified Health Coach, you'll expand your skillset and advance your career. Enabling you to help people while earning an income. In partnership with Nutrition Factors, all HCCA graduates will have immediate access to the Nutrition Factors Coaching Portal.



## ***CDC Diabetes Prevention Program [DPP]***

The Prevent T2 Lifestyle Change Program is a yearlong program designed for people with prediabetes. It is also designed for people who are at high risk for type 2 diabetes and want to lower their risk.





# CDC Diabetes Prevention Program

## *How does Type 2 diabetes affect work performance? Diabetes Is Costly.*

Type 2 diabetes affects millions of individuals and their families, workplaces, and the U.S. health care system. People diagnosed with diabetes incur on average \$16,750 annually in medical expenses. That's about 2.3 times the medical expenses of a person without diabetes. [2]

In 2017, the total cost of care for people with diagnosed diabetes was \$327 billion with **\$90 billion attributed to reduced productivity**. [3] In recent years, more employers have become proactive in establishing wellness programs designed to minimize future costs and concerns associated with this preventable disease.

Nutrition Factors is proud to qualify to deliver the CDC Diabetes Prevention Program [DPP] to your employees.



+



**NUTRITION**<sup>™</sup>  
F A C T O R S

[2] <https://www.cdc.gov/diabetes/prevention/about-prediabetes.html>

[3] <http://www.diabetes.org/advocacy/news-events/cost-of-diabetes.html>





**“The big secret in life is  
that there is no big secret.  
Whatever your goal, you can  
get there if you’re willing to work.”**

**- Oprah Winfrey**



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