



Patient / Client Management

A. Initial Consultation

Greeting:

Welcome clients and offer a drink of water, tea, or coffee

When a client comes in for the first consultation, he / she is given a clipboard with information and questionnaires to fill out:

- Intake Form
- Wellness Questionnaire

The Consultant reviews the client's information before beginning the consultation. The client should be offered something to drink a second time. (Water, coffee, tea, drink of the day) and then directed to watch any/ digital signage video.

Client Consultation:

- Welcome the client
- Thank the client for choosing you & spending time with you.
- Ask how they heard about us. If they are a referral, tell them we appreciate the referral as that is the highest form of compliment.
- Review their goals by asking:
 - *"I see you've written down some goals. I'd like to review your goals."*
 - Ask about other weight loss programs they have tried before.
 - Let the client do most of the talking.



- Review the questionnaire they filled out.
 - Tell them we have solutions to address these issues and will be there throughout the process to help them address these issues.
- Share any personal experiences with weight loss
 - Your personal weight loss journey.
 - Emphasize all the successful clients you have helped.
- Review the available Soza programs:
 - Mention many centers across the country.
 - Emphasize Wellness philosophy

Why you believe this weight loss program aligns with your and their core beliefs.

WHY: Wellness philosophy, all-natural, non-GMO, sustainability, long term benefits

WHAT and HOW-IT-WORKS: Review supplements, watch any video and go over program.

Review the all-natural supplements:

- High quality ingredients.
- Minimal fillers.
- Manufactured in the USA.
- Briefly review how to take the supplements.
- Our goal from the first day a client joins, is to keep the weight off. All programs come follow up visits with intention to keep client successful and keep weight off. Client will be learning what foods to eat coupled with a holistic wellness philosophy.
- Outline programs:
 - Foods are generally: low salt, no fat, no starches (the main programs). There are more lenient programs.
 - Show the colored food list that is on display.
 - Review book- show recipes, journal, sample menu. In addition mention we have more recipes, and can always adapt eating plans while on the program.



- Review follow up sessions:
 - Counseling and weigh ins.
 - Private thorough sessions
 - Access via emails, and phone,
 - Education materials handed out
- Ask if they have questions throughout the presentation
- Review pricing
- Review specials we are running and financing options
- Review the quick check-out process briefly and reinforce that they can get started immediately.



Check out process:

- Assistant (or consultant) can take over by getting all the items of the specific program chosen, then reviewing the program the client just chose.
- Measurements are done, weight, BMI, %fat, body analysis (if applicable)
- Assistant (or consultant) motivates the client and encourages them!
- Give client education material (refer to follow up tip sheet)
- Set up follow up appointment
- Give personal email address, phone number, business card and emphasize that the consultant and assistant are there for the client EVERY step of the way!
- Thank the client again for choosing you
- Input all metrics into computer system/CRM accurately!
- Set up follow up email schedule based on their start date
- Set up reminder to contact client on day 1, day 3, day 7 etc.



B. Handling Objections

At times prospective clients may have questions or concerns that surface during the enrollment. When a prospect asks a question, it is a good sign. Questions should be treated as buying signals because they usually indicate interest in the program. The most effective way to handle a question is to welcome it, respond with a brief, honest answer and then confidently re-close the sale.

When a client has a concern at the end, this can also be overcome by relaxing and helping the client by finding solutions together.

Objections are often an excuse to put off getting started on their diet today.

Typical Objections:

- "I want to think about this."
- "I need to speak with my husband before getting started."
- "That's more than I can afford right now."



Believing in the program is essential to being able to overcome objections in the close. In addition, following the easy steps outlined below will help in guiding prospects to making a buying decision.

Steps to Overcoming Objections:

- Ask questions to find the true objection
 - *“Jill, you’ve been very open with me about how important it is for you to lose this weight...Can we talk a little more about what’s holding you back from getting started today?”*
 - *“Is it just the initial cost that you need to think about or is there a concern about the Program you’d like to share?”*
 - *“Based on everything you’ve told me today, it sounds like you’re very committed to losing this weight...It’s really just a matter of making the Program more convenient for your budget...right?”*

- Show concern, empathy and confidence that you can help
 - *“I understand how you are feeling”*
 - *“I have helped other clients with this concern”*
 - *“I know we can find a program that fits into your budget.”*
 - *“I’d like to share some solutions that have worked well for them so we can (link to prospect’s goal) get you looking fantastic in that bikini and feeling like your old self again.”*

- Reclose
 - *“How do you typically handle investments like this...with a check or do you prefer to use a credit card?”*
 - *“Jill, I have the perfect solution, we can get you started with Care Credit.”*



C. Client Follow up

When a client decides not to enroll, it is important end the consultation positively and professionally. A client should leave still feeling good about the SOZA program. This will leave the door open to follow up and keep the prospect willing to consider joining SOZA in the future.

When a Prospect Says No:

- Maintain rapport.
- Thank the prospect for visiting the center.
- Let the prospect know the day you will be calling to follow up with her.
- Always walk the prospect to the door.
- Continue to follow up with phone calls on a regular basis to get the prospect enrolled.

Weekly Care Calls

- 3rd day on first diet day.
- 7th Day to keep them motivated
- 15th Day – either they come in, if not call them and see how they are doing.

Telephone Messages-privacy

When leaving messages for potential clients and clients it is crucial to **remember that weight loss can be a very private thing for many people**. At the time of the consultation and enrollment ask clients for a number that you can safely text and call to contact them.

The best way to leave a message when you are not sure who may hear it, is to say your name and the center you are calling from without identifying the center as a weight loss facility.

Hi Diane, this is Lucy calling from the center of awesomeness. Can you please call me at 008-452-3333? Thank you and look forward to talking with you.