


Client Assessment Tools for Holistic Practitioners:

Bonus Call: Creating Your Premium Coaching Package

With Dr. Ritamarie Loscalzo




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Package Your System

- ✓ Identify what's needed to support diet and lifestyle changes
- ✓ Avoid "pay as you go" model
- ✓ Bundle visits with tools – e-books, recordings, recipes, etc.
- ✓ Determine "easy to say yes to" fees and package prices
- ✓ Offer quick signup bonuses
- ✓ Catchy names help – i.e. *Jumpstart Your Health* package




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Package Type #1: Monthly Retainer

- ✓ Clients work with you on a month-to-month basis
- ✓ Can cancel on either end with 30-day notice
- ✓ Automatically billed unless cancelled
- ✓ Set number of sessions of particular duration each month
- ✓ Great way to get started




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Package Type #2: Time Period Package


- ✓ Multi-month commitment
- ✓ Substantial savings over retainer
- ✓ Walk them through your system
- ✓ Accountability (forms, status, diet diaries)
- ✓ Include bonus materials
 - Assessments
 - Handouts
 - E-books
 - Checklists



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Examples of Time Period Packages

- ✓ 30-Day **Jumpstart**
- ✓ 90-Day **Intensive**
- ✓ 6-Month **Immersion**
- ✓ 1-Year **Transformation**
- ✓ VIP Day




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Package Type #3: Package of Sessions

- ✓ Clients commit to a certain number of sessions
- ✓ Clients can use sessions whenever they want
- ✓ Savings compared to individual sessions
- ✓ Put a time limit on it so they don't come back years later to use their sessions

Example: Package of 5 Sessions



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Hot Package Naming Tips

- ✓ Language
 - Makeover
 - Transformation
 - Intensive
 - Jumpstart
 - Skyrocket
 - Immersion
 - Accelerator
- ✓ Results Oriented

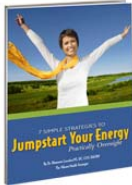


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Dr. Ritamarie's First Package

30-Day Jumpstart Your Energy

- ✓ Initial consultation and comprehensive history (90 minutes)
- ✓ 3 Follow-up calls, 1 week apart
- ✓ GREEN Cleanse Program
- ✓ E-books and recipes



Price: \$497

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Group Coaching

- ✓ Webinars or teleseminars – content
- ✓ Coaching
- ✓ Handouts
 - Recipes
 - Checklists
 - Menu plans
 - Assessments
- ✓ Videos and Audios
 - Demonstrations
 - Exercises



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Dr. Ritamarie's First Group Program

90 Days to Vibrant Energy


- ✓ Small group – 12 people
- ✓ 6 people coached as a group \$697
 - 6 group coaching calls
- ✓ 6 people coached privately \$1,497
 - Initial consultation
 - 6 1-hour coaching calls
- ✓ 1 all-day goal setting virtual workshop
- ✓ 7 content teleseminars
- ✓ Handouts: checklists, menu plans, recipes



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Session Examples


1. Health Assessment and Goal Setting
2. Beverage Swap
3. Alkaline Balance and Greens for Vibrant Health
4. Oil Change – healthy fats
5. Digestive Aids – chewing, enzymes, probiotics
6. Blood Sugar Balance
7. Proper Protein
8. Gluten Free
9. Stress Transformation
10. Fitness
11. Sleep
12. Environment Cleanup – home and personal care products



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Session Flow

- ✓ Celebrate Success
- ✓ Explore Follow-Through
 - If successful, identify what helped that
 - If not, what prevented you and what needs to be in place for success
- ✓ Educate – new information
- ✓ Experiential Exercise
- ✓ Action Steps
- ✓ Session Insights (Aha moments)



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VIP Day Options



Format	Topic/Focus
✓ Virtual Private	✓ How to Get Started
✓ Live Private	✓ Step-by-Step
✓ Virtual Workshop	✓ Mastering a New Skill
✓ Live Small Group	✓ Total Immersion

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VIP Day

- ✓ 4-5 simple modules
- ✓ 30-45 minutes long
- ✓ 1-2 activities to get your client into action
i.e. pantry cleanout, worksheets, exercises, food prep
- ✓ Bonuses: checklists, templates, recipes, videos, menu plans, exercises, e-books

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