

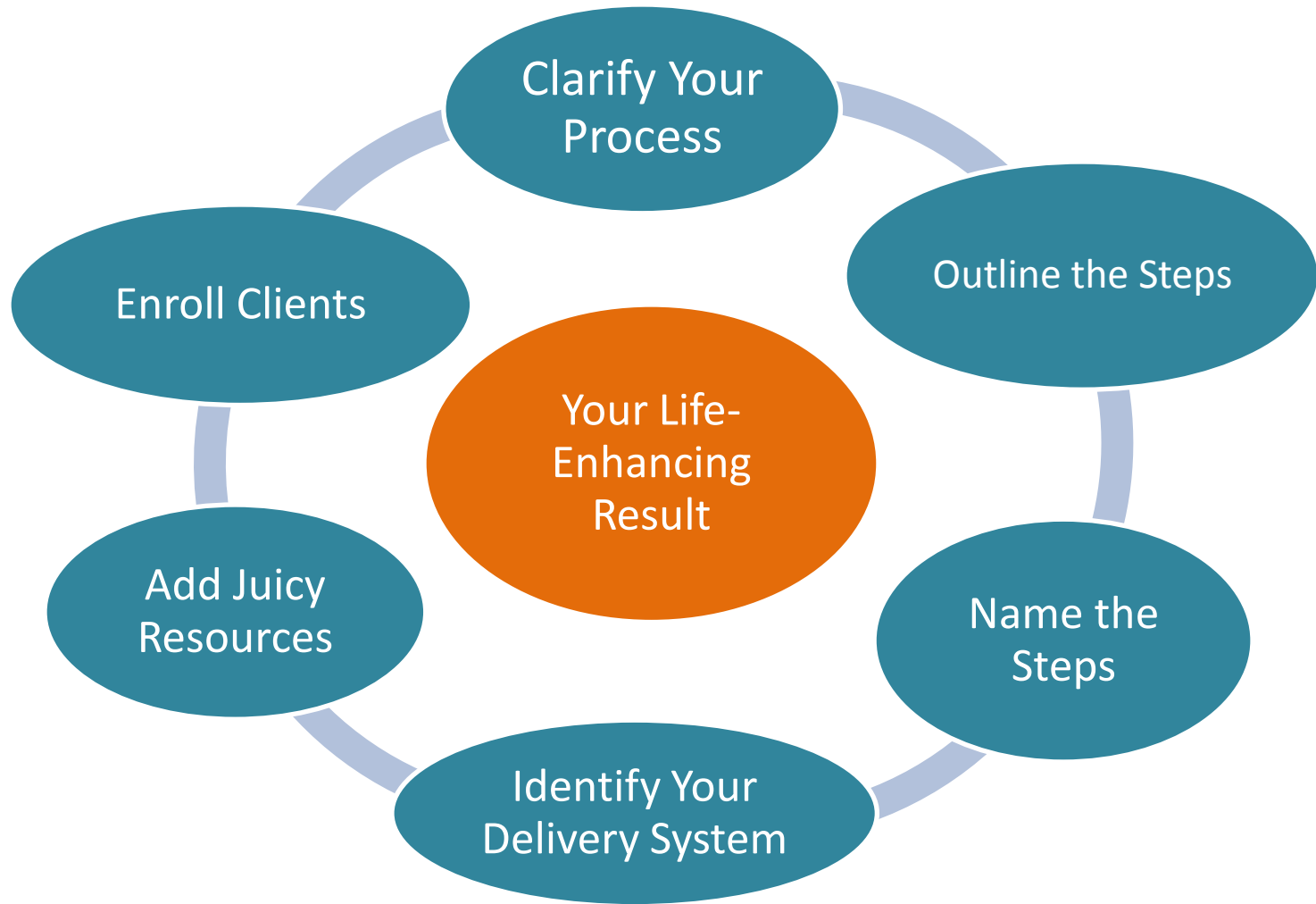
# Client Assessment Tools for Holistic Practitioners:

**Bonus Call: Creating Your  
Premium Coaching Package**

*With Dr. Ritamarie Loscalzo*



# Your Unique Health Coaching System



# 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



# 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



# 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



# Examples of Time Period Packages

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



# 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



# Hot Package Naming Tips

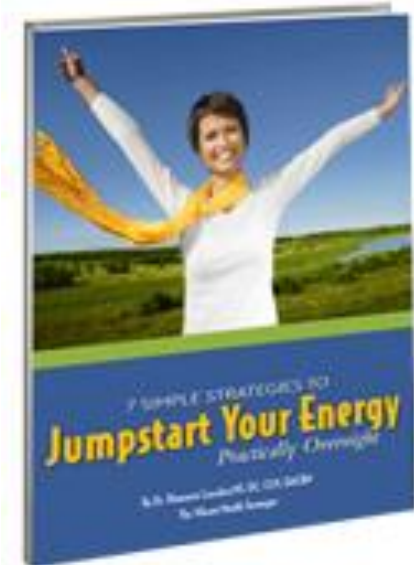
- ✓ Language
  - Makeover
  - Transformation
  - Intensive
  - Jumpstart
  - Skyrocket
  - Immersion
  - Accelerator
- ✓ Results Oriented



# 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**

# Group Coaching

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



# Dr. Ritamarie's First Group Program

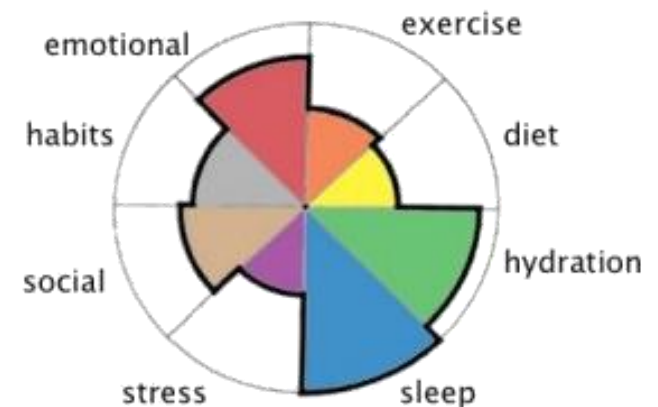
## 90 Days to Vibrant Energy

- ✓ 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



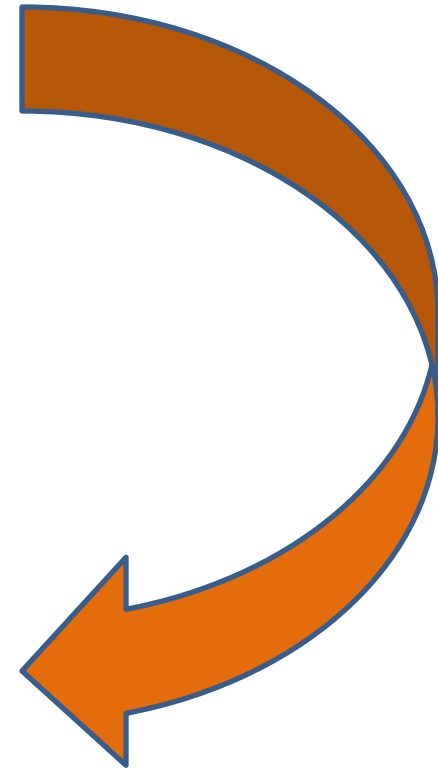
# Session Examples

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



# 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)



# VIP Day Options



## Format

- ✓ Virtual Private
- ✓ Live Private
- ✓ Virtual Workshop
- ✓ Live Small Group

## Topic/Focus

- ✓ How to Get Started
- ✓ Step-by-Step
- ✓ Mastering a New Skill
- ✓ Total Immersion

# 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