



History Taking: Demographics and Goals

Transcript

Let's get started with taking a look at the demographics and general information part of the thorough history. Before we begin let's just make sure you are aware that any information that I am presenting here is not intended to replace a one-on-one relationship with a qualified healthcare professional and it is also not medical advice.

When you are presenting to your clients you need to be really careful and make sure that they are aware that what you are presenting and what I am presenting here today is intended as a sharing of my knowledge, information, clinical research, and clinical experience over many years. I encourage you and you should encourage your clients to make their own healthcare decisions based upon your research and in partnership with a qualified healthcare professional. This is especially true for people who are on any medications. I just want to make sure that the things that we talk about in terms of nutrition are not going to interfere with the protocols.

We begin with the normal basic information: address and phone number, height and weight, although height and weight are a fairly integral part of what you are doing as a nutritional coach. You want to know the age, the place of birth, the date of birth for sure, and then their marital status and family situation, brothers and sisters, children, spouses and family, mom and dad, are they all living in the same household, are they living separately, do they have their own household or are they living in someone else's. Those are important questions to ask because it has a lot to do with the compliance you get as you give them the changes, the lifestyle and diet changes that you want them to do.

Then you want to look at their occupation. This gives us a general idea. Then we get some ideas about whether there are occupational hazards, exposures at their job, stresses, etc. We want to look at their level of education, how much they travel, do they travel to foreign countries, do they travel a lot for business, do they travel a lot for pleasure. That gives you an idea of the kind of stress that they are under, and also how well they are going to be able to comply with some of the diet and lifestyle changes that they will be making as a result of working with you.



Finally we look at pets. Pets are important to know about because if somebody is suffering from weird gastrointestinal problems and you do not ask about pets, you may be missing something where they are getting transmission of various kinds of parasites and other organisms from their pets. Same thing with travel. If you missed that they travel a lot to foreign countries that you may not be getting the information that could lead you to suspect a parasitic infection or some sort of weird microbial infection that has occurred.

Let's actually take a look at the forms. As I said before I am giving you as much as I possibly can for each of the types of areas of the thorough history. I want to give you an online form when I have one, a word file so that you can actually go in and make changes, you can merge forms, you can do whatever you need to come up with, put your footer on it, your phone number so people can contact you, and also a PDF file if you just want to have a ready to go, it is done for you; just take it and print it out and hand it to people, you can do that as well. Or you can upload it to a webpage so people can download it, print it and fill it out. Let's take a look.

We've got three different forms for the demographics and general information. The first one is my online assessment. It is a little bit more than just demographics. It is something that I use a lot in the first consultation with somebody if I am doing something I call a discovery consultation, where I am going to explore some things that are going on for them, and give them a couple of starting points and then if we are going to work together I am going to get into more depth. That is what is in this. It has demographics and some kind of robust set of demographics. Then the Word doc and PDF doc are pretty much demographics.

Let's take a look at them. We've got the general health questionnaire. I give them a little intro. It basically is asking them to put their email, their address, all of the different phone numbers, age, date, birth, height, weight, birth, marital status. These are all done with drop downs so they can choose the one that applies to them. Their partner's name, the kids they have, what their kid situation is, because that makes a difference too. If they are at home with seven or eight kids, or three or four kids versus their kids are grown up, that is going to make a difference in terms of the level of stress on them and how much obligation they have to make meals for everyone else.

Then I have some general questions: tell me what you're seeking help with? What are your health concerns, your top ones? What other interventions have they done? These are very general and open-ended questions that will allow them to give me as much information as possible.



Priorities, I like to ask about priorities. We will get more into this when we get into the goal-setting. But priorities are really important because if we get them to really hone in on what their priorities are, then you can feed that information back. So when they say, well my top three priorities are, health, and freedom, and being active. Then they are complaining about having to change their diet, or go gluten-free, or incorporate green smoothies. You can turn back and say, you say this is a priority, your health is important to you. Now what you are telling me also is when you go out with your friends you think it is okay to eat pizza even though it causes a flare-up of your symptoms. So what is going on here? You really need to be able to call people on their stuff and help them make the distinctions. I always ask about their priorities so that can help me to help them.

Then I ask them what habits do you currently have that positively affect your health and that negatively affect your health. It is always interesting to see what people answer here. Some people are right on, they are living in the real world, and they give me the positive things that are really positive and they are really aware of the negative habits that they have. Some people, what they think are positive habits are what we as nutrition and health coaches would think are not so healthy. It is really interesting and gives their perspective on what the real world looks like. Rate their stress level and then they get to choose from 1 to 10. What are the major stressors?

A general little blurb on what other medications and over counter stuff, and supplements that they take. What surgeries and hospitalizations? This is a real brief, usually when you just ask brief like this it just gives me an overview. When I am doing a more thorough history and I know that I am going to be working with this person on an ongoing basis then I get into a lot more detail and you will see that in some of the other forms but this is a really good, general screening kind of tool and something that you can use in any introductory consultation if you are not sure and they are not sure if they want to invest the time to work together.

The three worst foods, the three best foods that you eat, those are always great, surprising answers. I see people put down whole wheat bread and cheese and low-fat milk as the best foods that they eat in a week. That is where they are at. Others, their worst foods are better than some people's healthy foods. Some may say, my worst foods are steamed broccoli and olive oil on my salad and handfuls of nuts. That may be the worst thing that they do in a week. So it varies and goes all over the map. It really gives you a general idea of where they are at. Then I get some general dietary things. I have a very detailed questionnaire that I will share with you on the very specifics of their diet but this gives me general information.



How many alcoholic beverages? How many decaffeinated beverages? How many times do you eat out? How many times do you eat walnuts and seeds? How many times do you work out in a week? These are all real easy to answer because they are drop downs. They just have to pick it. Then you don't get answers that are all over the map.

I ask them a little bit about what exercises they do. Do they smoke? Do they drink? Are they spending time outdoors? Do they use sunscreen? This is kind of a trick question almost because when people say, they think you want them to say yes and quite frankly I am looking to see if they are at risk for a vitamin D deficiency because they are out in the sun but they are always using sunscreen. So it gives me some really general stuff. It only takes people 20 minutes to a half hour to fill out. I can go through it really quickly and it is a really great initial screen.

And toxic exposures. And what is the one thing that you would like to accomplish during our first session together? It is really nice when you ask that and it is a realistic request, that you work with that. A lot of times they are not realistic and a lot of times they are very unrealistic, like I want my Hashimoto's to go away. Sorry that does not happen in one session. So let's take a look at the paper and pen kind of quizzes that we have.

We've got the Word doc and the PDF doc that are both kind of the same. Here is our general information page. Again, it is just a different way of doing it. It is asking similar questions, not quite as detailed as my online form but this is something that you can give somebody and get the basics. This one asks right-handed, left-handed, and that is something that I can incorporate into my online form. How did they hear about you? What about their family members, and some things about their family background, marital status and children. This is pretty clear stuff. Things about travel. Do they have farm animals? Have they traveled outside the country? Any major life changes or experienced any losses? Lost time from work or school?

You may find that you like some of the questions in one and the other and you are going to combine some of them. Forms have been something that have been very evolving for me. As I speak and learn more and go to different seminars, I start to incorporate different questions. As I work with people I find what phrasings didn't work well and I rephrase it. My forms have undergone lots and lots of change over the years. I am giving you forms that I use at a point in time. I do not use the paper and pen ones as much anymore. I mainly use the ones that are online. It is rare that I get somebody that does not use the Internet.



I really attract people who are online and who are really interested in learning online and not necessarily going to an office. There is also a PDF version of it.

Now let's take a quick look at the health goals portion of this. As you saw when I showed you my online forms some of that is incorporated there but I also do have another online form for goals. I also have a paper and pen form as well that you can use you are welcome to use those. Let's take a look at what is included there and then I will show you the actual form. First we want to look at what are they looking for. Are they looking for symptom suppression? Are they looking for preventative health?

Are they seeking optimum health and functioning? Depending on where they are coming from you will determine how to approach them and how you are going to influence them to make changes. I always like to offer them the opportunity to share with me their five-year vision. When I ask someone about their five-year vision, it is usually when I am speaking with them, not necessarily on a form, although I do have a little vision exercise that I give people oftentimes. It is very long and detailed so I usually do it as part of a program. But the five-year vision is really cool. If I could wave my magic wand and all of your health challenges are gone and your energy is just through the roof, what does your life look like?

People love to get into that. You would be surprised at what comes out of their mouths and they are sometimes surprised. When you get them really excited about that vision they are going to be much more motivated and inspired to follow through on the protocols and recommendations that you are going to make. Once I've got them doing a five-year vision then I say "okay, in order to be where you really want to be in five years, where do you think you ought to be in a year?" If this is a person who has 200 pounds to let go of and they want to be slim and trim in five years, we know they are not going to drop those 200 pounds in that first year but what is a reasonable weight to be at? What is a reasonable level of health to be at? What is a reasonable fitness level? I don't mean reasonable in terms of squashing their vision. I mean what is attainable. It has to be attainable. You want it to be bold and you want it to be a stretch. I really prefer that if someone who has 200 pounds to drop does not tell me that they want to lose 10 pounds in a year. That would be really slow. It's going to take them 20 years to get rid of that extra weight. I want them to be attainable but I also want them to be bold enough that it is a challenge for them to look to. And I want them to get excited about it.

Then I want to hone it down to a 90-day goal. That 90-day goal may be very specific, small part of the big vision. I like them to break it down there and then we can break it down into actionable steps and that is part of the coaching that I do, it is not part of the assessment.



I do view this as part of the assessment because I want them to get in touch with what is really going on with their body, with their mind, with their emotions, with all of the things that are going to influence their ability to make decisions.

Finally we may break it down into a one-month goal. You've got this goal, where do you want to be at the end of the month? I think it is really important to keep people focused on the goals. We have a health goal and vision form so why don't we take a look at that?

Health goals and vision, it is right underneath the demographics and general information files on the website. The health goals and vision, we have an online assessment, a word version and PDF. In order to take the leap and make major diet and lifestyle changes it is important to make a big enough "why." When you create a big enough "why" for people the how to just follows. After all, that is what you are going to be teaching them. You can teach them the how but they have to have that "why" so that they are motivated and inspired to follow through. I really feel like getting in touch with their values, visions, and goals and staying connected is the first step towards creating that vibrant health and boundless energy that most people really want. They may say they want to get rid of their headaches but really if they had a choice between just getting rid of their headaches and having this amazing energy and phenomenal body, and feeling great all the time, they would probably choose the latter. Let's take a quick look at the online assessment and then the Word version.

Goals, Visions, And Values form. This is an abbreviated version of a very long form. Actually I have three forms, one for values, one for visions, and one for goals. Like I said that is not usually done as part of an assessment. That is usually done as part of a program, a coaching package, and me guiding them through flushing out their values and their visions and their goals. On this form I asked, make a list of the top five things you value the most in your life. I just asked them to write a sentence or two.

This is so great. Some people get really into that and really tune into why it is important, why they want to be healthy. They realize things about why they want to be healthy or why they want to have money or why they want to have an education, and they realize that sometimes they think their top values are certain values and then when they really dig they realize that the reason they value one thing is because it gives them another. We make a distinction between means-goals and ends-goals, and means-values and ends-values. I asked them to do that with the five values. What do they value most and what is the most important? In the longer exercise I have them go through a list, a sheet that has about 100 words on it.



We hone down the words and compare and contrast. It is a great exercise but not something that you can do on an initial assessment necessarily.

Creating your vision of the you that you want to be in five years. Here is that five-year plan. I just ask them to envision and I ask them to imagine themselves and then write. These boxes will expand to as big as needed. It is really very flexible. Then choosing their bold goal, their 90-day bold goal. What is one goal that they would like to celebrate completing in 90 days from now? I like them to make a specific, measurable goal that's realistic, not unrealistic like losing one hundred pounds in 90 days. Don't set it up for failure. So that is the online form.

Let's take a look at the Word version of the form. It is a very brief form with lots of open space for them to write. It's very similar to what we had before. Make a list of their top five values, what is important, create the vision. It gives them the space to do that. Choose their bold goal. I added a few extra questions to this paper one. List five things that you have been unable to do as a result of your present symptoms. Be specific. I only do this if I use the paper form and that is really rare. Usually these are questions that I would be asking them. So what is this keeping you from doing? What is this constant headache preventing you from enjoying your life? What kinds of things would you do with your life once those things are fixed? Really just great questions if you want to get good compliance from people and good follow-through, and for them to get the very best results. Then I asked them if there is anything else goal-wise that they would like to achieve and give them a place to do that.

In our next video we are going to look through the history of their chief complaint. Collecting information about what they are really here for, and what they want you to 'fix'. You know we don't really fix anybody but that is what they think and what they are there for, to get particular things taken care of.