



Customized Package Counseling Breakdown

Time: 75-90 minutes with client

Your goals with client:

- ✓ Determine their baseline and what changes are realistic to make
- ✓ **Take measurements using biometric tracking sheet and before/after pictures**
- ✓ Use handbook to walk your client through the consult
- ✓ Set SMART goals and write down plan to achieve those goals
- ✓ Dive into Nutrition 101, understand macronutrients
- ✓ Have client highlight the foods they like in the “What is one serving?” section of the handbook
- ✓ Use the **online calculator** to determine appropriate meal plan and macronutrients while client is highlighting their food preferences
- ✓ Customized day worksheet (**have the client write out each day and sit next to them to help**)
- ✓ Give 4 weeks sample meal plan (**explain swapping foods in and out of the meal plan according to preferences**)
- ✓ Download MyFitnessPal, change calorie and % goals, explain how to use it by logging in the food they ate the previous day
- ✓ Send out immediate follow-up email (see template below)
- ✓ Schedule additional Follow-up email to go out in 2 weeks (see template below)
- ✓ 2 Face-to-face appointments

First things, first: Explain what you are going to do. Briefly go through the checklist with them so they know what to expect.

Step 1: Determining a Baseline (about 10 minutes)

The goal of going through this exercise is to see the easy points to change. Letting the client do most of the talking to open up at the beginning is key.

How to determine your baseline? Are you eating CLEAN?

- **C: Consistency/timing/eating around workouts**



- What does your typical day look like? How many meals do you get in a day? Do you snack or graze throughout the day? Are you eating before and after you workout?

****You want consistency with you eating. Eat every 3ish hours alternating between meals and snacks. Set an alarm & get on a schedule.**

- **L: Liquids/hydration/alcohol**

- How much water do you drink a day? What other types of beverages do you drink? Do you drink sugar-sweetened beverages (juice, soda, sweet tea, lemonade, flavored coffees)? How much and how often do you drink alcohol?

****Water is KEY to metabolism and breakdown of fat. Sugar sweetened beverages, artificially sweetened beverages and diet sodas don't count to your water intake. Focus on getting 60-80 ounces per day. Add fruit, mint or cucumber to flavor. Use a water chart!**

- **E: Eating out**

- How often do you eat out? Where do you usually go? What do you usually get?

*****Beware of all the sodium and fat added to foods to improve taste when eating out which can cause you to gain additional water weight. Ask for foods plain. Focus on the plate method when eating out. Know that you can ask for grilled chicken and veggies. Try to skip the apps and breads/chips. Take a look at the menu before hand.**

- **A: Adequate calories/too much or too little**

- Do you track your food or make a food log? Have you ever use a food tracking application (MyFitnessPal)?

*****Taking your food helps you to stay accountable to yourself. Clients who track their foods have a much high success rate than clients who don't, even if they don't show it to anyone. Two options for tracking food; use the food log that you give then or MyFitnessPal.**

- **N: Nutritious foods/quality macronutrients over quantity**

- How many servings of fruits and veggies do you include into your diet? Do you include whole grains into your routine? Do you include protein and carbohydrates with all meals? Do you shop the perimeter of the grocery store?

***** You want to focus on whole foods not food products. Try to shop the perimeter of the grocery store. The majority of your lunch/dinner should**



consist of non-starchy veggies. Look at the ingredients label; if you can't read it, skip it!

Step 2: Goal Setting (10 minutes)

Determine what your client is willing to change and focus on that. Explain that about 70% of the weight loss battle is directly related to nutrition and fueling your body. Focus on nutrition related goals and maybe 1 goal of getting into the box/X number of classes per week.

You want to set yourself up for success by setting SMART Goals!

- S: Specific
- M: Measureable
- A: Attainable
- R: Realistic
- T: Time Sensitive



Tips when setting your goals:

1. Look at the big picture first. What are your health/ fitness/ weight/ financial/education/family goals in a specific amount of time- 1, 5, 10 years down the line?
2. Set smaller goals for what you would like to accomplish 1, 2 3, 6 months.
 - Have a to-do list
 - Use a calendar
 - Prioritize
3. Set performance goals (ie: lifting weights, weight loss) that will motivate you. Write down WHY it is important for you.
4. Always have an action plan. Write down the steps you are *realistically* going to take to achieve your goals.
5. Stick with it! By telling your family and friends, you will have someone to stay accountable to and keep you motivated.

*****Have your client write down their goals on their goal handout! Realistic weight loss is 1-2# per week, realistic fat loss depends on how much they weigh, morbidly obese take longer to lose body fat percentage. When clients lose weight rapidly, explain you are losing muscle or water weight by cutting**



carbohydrates or drastic calorie deprivation. Balance is key and focus on the big picture, not just weight.

Step 3: Nutrition 101 and Healthy Steps Keys to Success (15 minutes)

The Macronutrients!

1. Carbohydrates: our body's main source of fuel, spares protein from being used as energy, aides with the oxidation (breakdown) of fat

- Fiber: non-digestible carbohydrate, delays glucose absorption, helps you stay full, decreases cholesterol levels, aides with reducing triglyceride levels
- Glycemic Index: tells us how fast our blood sugar will rise after eating a food (stick with low glycemic foods index foods)
- Sources: starches (bread, pasta, rice, beans), starchy veggies (potatoes, peas, corn), fruit, juices, dairy

2. Protein: made from amino acids that provides our body's structure, regulates body function, components of enzymes, aides with immune system health and hormone regulation

- Essential amino acids: amino acids that can't be synthesized by the body (**eggs** contains all essential amino acids). Complementary proteins are two or more foods that when are eaten together they provide all essential amino acids (legumes & rice, mushrooms & broccoli)
- Conditionally essential amino acids: body can make the precursors but under some conditions we can't make enough (ie: glutamine and arganine during stress)
- Sources: fish, chicken breast, pork loin, legumes, nonfat dairy, turkey (stick to the lean meats)

3. Fats: components of membranes particularly in the brain and nervous system, aides in the absorption of fat-soluble vitamins, used as a source of energy... WE NEED FAT

- Stay away from saturated and trans fats (increase your bad cholesterol, trans fats decrease HDL cholesterol)
- Increase Omega 3 intake (salmon, herring, canola oil, olive oil, flaxseeds, **chia seeds**, some eggs are fortified, **supplements**)
- Cholesterol: component of cell membranes, needed for hormone production, our body makes cholesterol, found in animal fats (egg yolk, organ meats, fish roe)
- Sources: fats, meats, dairy, nuts/ nut butters, avocado, olives, butter, cream, coconut milk



Step 4: Determining Meal Plan

1. Find your current weight and body fat percentage
2. Weight x body fat percentage = pounds of body fat
3. Find lean muscle mass by subtracting your pounds of body fat from weight
4. Multiple activity factor

Activity Level Chart	
Sedentary	0.6
Moderate exercise (30 minutes per day)	0.6-0.7
Beginner Crossfit Athlete (2-3x per week)	0.7-0.8
Active Crossfitter Athlete (3+ times per week)	0.9-1
Strength Training, Competitive Athlete	1.1-1.2

5. Divide by 7 to give you the “servings” of protein per day
6. Once you have the servings of protein, it is a 1:1 ratio of protein to carbohydrate. (For example: if you have 14 blocks of protein per day, you would also have 14 blocks of carbohydrates per day).
7. Add in the fat by starting with a 1:1-1:2 ratio of protein:fat. If you are very active, trying to gain weight or a competitive athlete, it is recommended to double the servings of fat with both snacks. If needed add extra blocks of fat at mealtime.
8. It is not recommended to exceed more than 6 blocks of protein and carbohydrate per meal.



TIPS:

- If you are trying to lose weight, I would go on the lower end of the percentages and do a 1:1 ratio between protein and fat. *If your BMI is > 40, use adjusted body weight.*
- Do not exceed more than 6 blocks of protein per sitting (42 grams of protein). Always pair your protein and carbohydrates together in this ratio of 1:1 zone blocks. Then add in the healthy fat at the end.

Step 5: Meal Plan Activities (10 Minutes)

1. Have client go through the “What is one block?” section of their handbook and highlight the foods in each category that they would eat.
2. Give the “designing my meal plan handout.” Have client make sample meals using the highlighted foods in each category.
3. Give client 4 weeks of meal plans closest to their allotted blocks (15, 18, 20) and go through the meal plan briefly. Explain that the rows can be swapped out but not the columns. They can always swap out foods as long as it stays with the same block amount in the block.

Healthy Steps Keys to Success Checklist:

KEYS TO SUCCESS:

- Drink plenty of WATER every day (drink at least 80 ounces per day). Stay away from concentrated juices, soft drinks (even diet sodas)!
- Be consistent (eat a source of protein & carbohydrate every 3 hours).
- Sunday Prep-day (get yourself set up for the week by preparing and portioning your food on Sunday).
- If you booze, you don't lose! Alcohol will significantly slow down the process of you achieving your goals.
- Post-workout recovery (increase lean muscle mass with quality whey protein after workouts).
- Take your OMEGA 3 FISH OIL SUPPLEMENT (at least 1500 mg DHA/EPA daily)
- At least 6 hours of sleep each night



- Write down everything, tracking your food intake will help you stay on track and see the results you are looking for!

Step 6: Meal Plan Tips (10 Minutes)

- You can interchange any of the boxes in the rows, for instance if you want oatmeal instead of protein pancakes one day, go for it. Just make sure you keep the same food groups paired together and portion sizes.
- If you don't like a protein, switch it out for another lean meat (chicken, fish, turkey) and limit the high fat red meats to only 1x per week.
- Pair protein and carbohydrates together at all times, even for snacks. It helps with metabolism and also helps to keep you full longer.
- Give one week of meal plans, draw attention to the bottom of the meal plan; on our website under the nutrition tab they will find healthy recipes. They are welcome to try *any* of the recipes.
- Explain to clients that it is highly recommended to track your food and water intake. Include our food log and tell them another option is to track via MyFitnessPal
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Steps 7: Accountability Tracking Forms (10 minutes)

Tips to keep in mind when taking measurements:

- Always try to do the same point of the day (morning or evening)
- Preferably not right after the workout
- Same person does measurements each time use the **key points**
- Before and after pictures (at the end make sure you ask if they give you permission to post as a success story). The more you post success stories the more new clients you will get! If they will take a picture in their sports bra (girls) or no shirt on (guys) you will be able to see the difference much clearer in the post pictures.
- Highly encourage clients to track their food, increases success
- Make the follow-up appointment during the initial consultation!

Measurements:

- Shoulders: about ½ inch down around their shoulders
- Chest: around the client's nipple line
- Waist: around the belly button
- Hips: around the biggest point of their hips
- Arm: midpoint between shoulder and elbow



- Leg: 6 inches up from the knee cap (if you have an extremely short person, do 5 inches and make a note on the paper)
- Calf: biggest point around their calf
- **ALWAYS do the RIGHT side**

In your client's folder include:

- ✓ Customized Package Nutrition Handbook
- ✓ Customizing Your Meal Plan Handout
- ✓ 4 Weeks of appropriate block meal plans (13/15/18/20/24/30)
Food log/MyFitnessPal
- ✓ Initial assessment form (*for you to take notes and to keep*)
- ✓ Biometric Screening tracker (*for you to take measurements and to keep*)

Following Up With Your Clients:

- Send email follow-up within the **same day** of seeing your client recapping the consult, bright spots, goals and **three clear steps of action**

Email Template For Immediately After Consult:

Hi (name),

It was a pleasure meeting you today! I'm excited to help you on your journey to achieve your **x goals!**

Today, we discussed your path of action for success. Here are the top 3 things to focus on:

1. Step 1
2. Step 2
3. Step 3

Keep up the good work with (bright spot). I look forward to helping you achieve your goals! Can't wait to see you on (insert follow-up date and time).

Let's do this!
(your name)



Email Template For Two Week Follow-up:

Hi (name),

I just wanted to check in and see how you were doing over the past couple weeks with the plan that we put in place! Two weeks ago we discussed ways to achieve (insert their goal).

We came up with an action plan together to:

1. Insert Steps 1
2. Insert Step 2
3. Insert Step 3

Hope all is going well so far! Please let me know if you have any questions!

I look forward to seeing you on (insert follow-up date).

Can't wait to see you,
(your name)