

You have clients!! What's next?

Now you need to learn how to provide “rockstar follow-up” so you keep the clients you worked so hard to get!

Here is how you can get organized with how to follow up with your clients! This is called the “Tickler File” and there are two different ways you can set it up (either a binder or a card box). Ask your mentor to show you their method.

Supplies you need:

- 5x8 index cards
- 5.5x8.5 1 inch binder OR (not both) a 5x8 card box
- 31 Sheet protectors for your cards to fit into if you are using the binder



Fill out a card for every client you have using the template below:

FOLLOW UP CARD	
NAME:	Prefer Text or Call
ADDRESS:	Cell: # *what time to call
	Email:
Notes of Evaluation:	**Height/Current Weight
	**Goal Weight
	[OTHER HEALTH ISSUES]
Times of New Personalized Nutrition Plan:	
Frequency of Bowel Movements	
Wake Up @6:30am Breakfast @7:00am -SHAKE	
Snack @10:00am- 10:30am (protein + fruit/veggie)	
Lunch @12:30pm- SHAKE	
Snack @3:00pm- 4:00pm (protein + fruit/veggie)	
Dinner @6:30pm- Main Meal	
DATE: (details of future conversations)	

Eleeka H. [REDACTED] 25% Cell [REDACTED]
 [REDACTED] [REDACTED]
 1502 #FFB

9/25/15 - works at Food Service Director @ McDonald's 5'2" @ 209
 - has 2 kids - 1 yr boy, 5 yr girl
 - recently diagnosed with Kidney stones
 - bought FT-VAN, FT-HOL, 1 PM (5000)
 - will add more things as she goes - DTC MVR
 4/25/16 @ 7:30 - 5:30 - 10:00/1:30
 7: B: Shake
 10: Protein snack - almonds
 11:30 - Main Meal - @ work - salad & meat
 4:30 - protein snack, Egg salad, tort. wraps - PB
 6:30/7 - f Shake
 *starting today

*weight in Friday @ 4:40 pm
 *B.M. - 1 today - feel more when she starts to eat healthier
 *Maybe will down road - likes challenges
 *wedding in August - goal to be like it by then
 *Need to ~~lose~~ lose on dieting more water

Label

your sheet protectors in the top right corner 1-31 (the days in the month). You will then put the client's card in the day that you need to follow up with them. For instance-if my client Amy started on April 3rd and I want to follow up with Amy on day 3 then I would put Amy's card in the sheet protector with 6 on it so on April 6th I can open my binder and see her card.