

MONTHLY THEMED VISIT · MONTH 1 OF 12

January — Fresh Start and Goal Setting

THEME

Building realistic goals and creating a strong foundation.

MEMBER NAME

COACH

VISIT DATE

TIME

WHAT'S INSIDE THIS GUIDE



Call Guide — Conversation starters and coaching questions.



Education — Key teaching points and talking tips.



Documentation — Your required charting checklist.



Monthly Challenge — One actionable goal the member can work on before the next visit.

**CORE REVIEW — EVERY MONTHLY VISIT**

☐ Scheduled monthly follow-up call completed with member.

☐ Member is currently taking the following medication:

☐ Member reports the following side effects:

☐ Member is satisfied with their progress: Yes / No

☐ Member's weight chart and non-scale victories were reviewed:

☐ Member is currently experiencing the following barriers to weight loss:

☐ Member has made the following changes to their nutrition and exercise routine:

☐ Hydration status:

 CALL GUIDE

Conversation starters and coaching questions. Ask each prompt and record the member's response.

1. What would you most like to accomplish over the next three months?

2. What is one habit you feel ready to work on first?

3. What has helped you stay consistent in the past?

4. How will you measure progress besides the number on the scale?

 Education

Key teaching points and talking tips. Check each topic reviewed with the member.

- ☐ Setting realistic and measurable goals
- ☐ Breaking large goals into smaller weekly steps
- ☐ Focusing on consistency rather than perfection

 MONTHLY CHALLENGE

Choose one small habit to complete at least five days each week.

One actionable goal the member can work on before the next visit.

Member agreed to the challenge: Yes / No Modified version recorded below.

**DOCUMENTATION**

Your required charting checklist. Copy this block into the member's chart note.

☐ Scheduled monthly follow-up call completed with member.

☐ Member is currently taking the following medication:

☐ Member reports the following side effects:

☐ Member is satisfied with their progress: Yes / No

☐ Member's weight chart and non-scale victories were reviewed:

☐ Member is currently experiencing the following barriers to weight loss:

☐ Member has made the following changes to their nutrition and exercise routine:

☐ Hydration status:

☐ **Monthly Theme Reviewed:**

☐ **Education Provided:**

☐ **Monthly Challenge Selected:**

☐ Goal for the month:

Next follow-up appointment scheduled for: Date _____ @ Time _____

COACH SIGNATURE

CREDENTIALS

DATE COMPLETED
