Q1 2022 Report

Field Training Analytics |

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Report Findings

- We spoke to 21 of the highest earning Coaches in Q4 2021
- We learned and analyzed strategies, tactics, training methods, and social media focuses over Q4 that attributed to their success
- This report details our findings

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Coach Demeanor/Reaction

- In general, Coaches were open to sharing how they train and run their teams. Some were reluctant due to the possibility of their strategies not aligning with Corporate efforts.
  - Ex: not sharing corporate content on their social media pages
- Coaches were appreciative of the opportunity to have an open conversation with a member of the **OPTA**VIA team.
- There were some concerns about potential compliance misses. Field Training worked with Compliance Team to create a talk track regarding this concern.
- The Field Training team was excited to have these conversations and further our connections with Leaders!

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Coaches Interviewed

- Vonda Livingston
- Suzy Heyman
- Patty Glick
- Pat Schatzline
- Michelle Heyman
- Melissa Tarleton
- Lenee & Patrick Rogers
- Kayce & Alan Smith
- Jennifer Morris & Tom Sarah
- Doug Wood
- Dominic & Rita Tarinelli
- Danielle Konigsberg
- Dan Bell
- Dan & Megan Valentine
- Corey Baker
- Carol Coufal
- Bryan Drollinger
- Brad Miller
- Bekah Tinter
- Alison Friedman
- Eric & Raquel Hunsberger

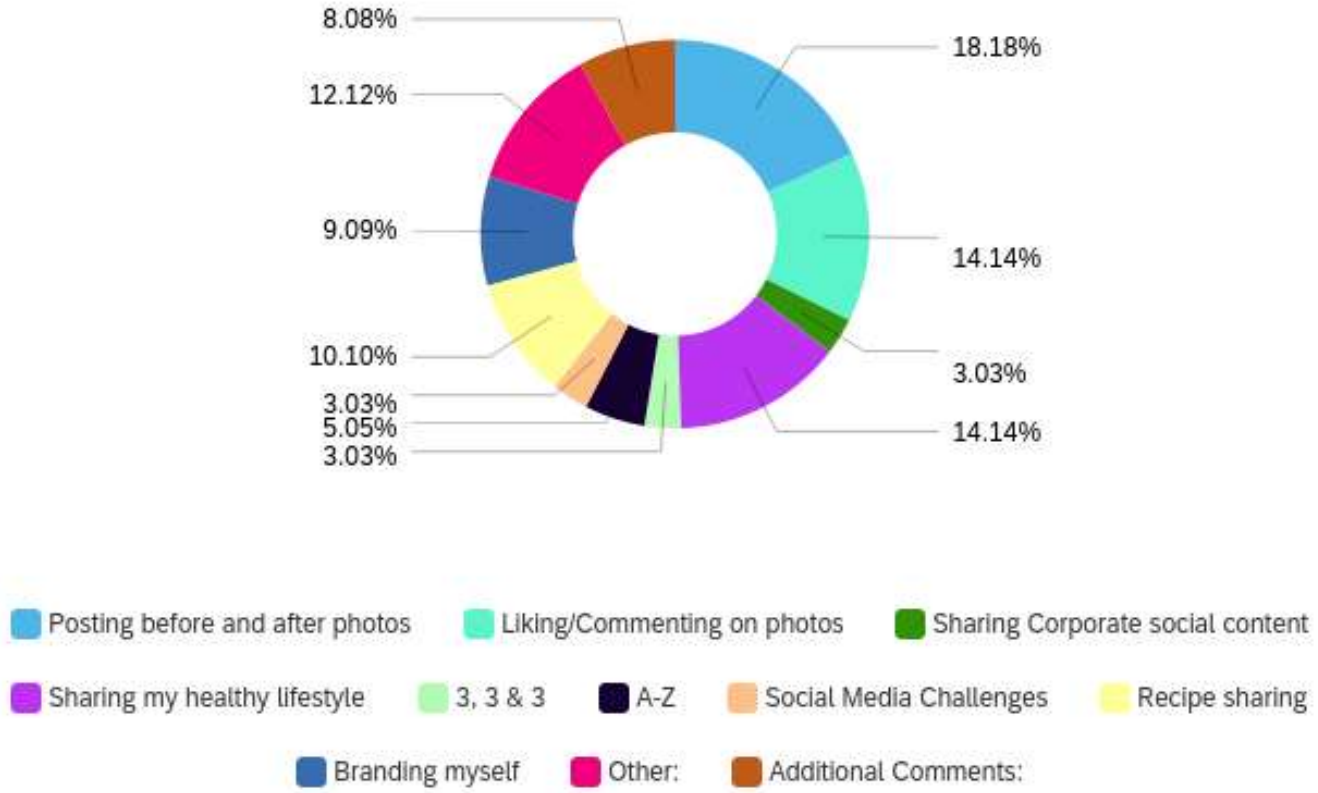
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Interview Findings

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What are your Social Media Focuses?



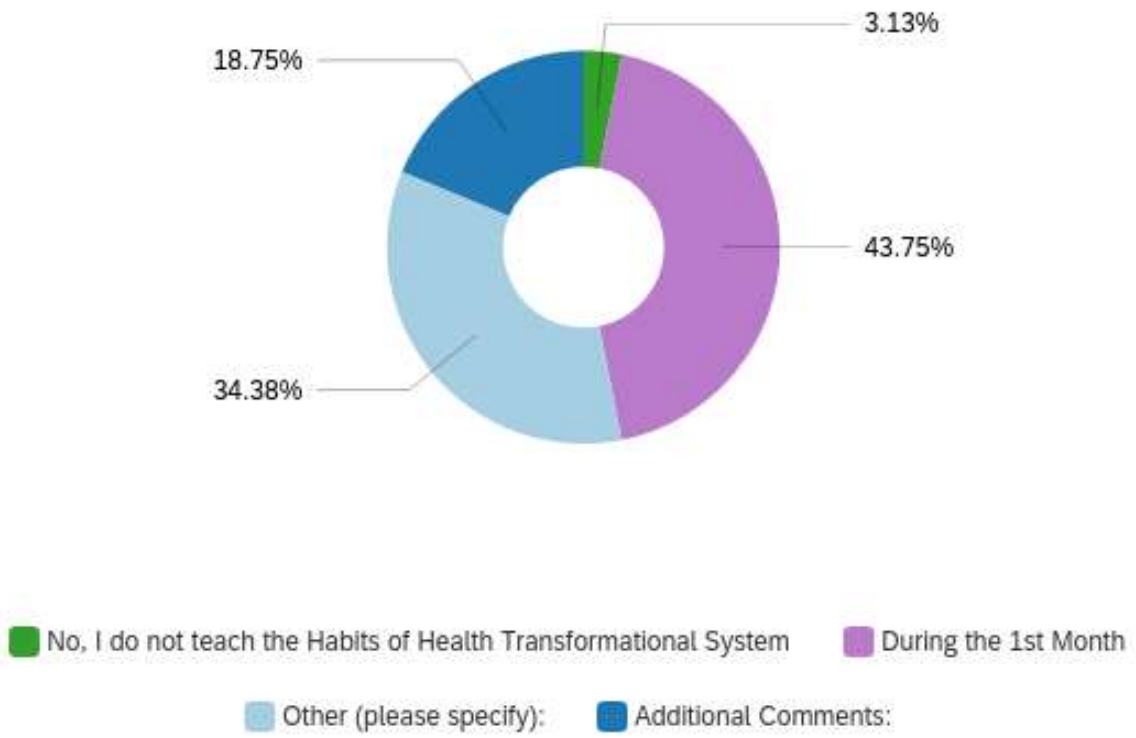
What are your Social Media Focuses?

#	Answer	%	Count
1	Posting before and after photos	18.18%	18
2	Liking/Commenting on photos	14.14%	14
3	Sharing my healthy lifestyle	14.14%	14
4	Other:	12.12%	12
5	Recipe sharing	10.10%	10
6	Branding myself	9.09%	9
7	Additional Comments:	8.08%	8
8	A-Z	5.05%	5
9	3, 3 & 3	3.03%	3
10	Social Media Challenges	3.03%	3
11	Sharing Corporate social content	3.03%	3
	Total	100%	99

Important take-aways:

- Leaders use their own Client & Coach Support groups via Facebook
- Emphasis on starting conversations. Recommended up to 6 new conversations daily via social media.
- It is important to post personal stories to cultivate trust through authenticity and build their personal brand.
- There is a large emphasis on consistency in posting

Do you teach the Habits of Health Transformational System? If yes, when do vou offer this to new clients?



Do you teach the Habits of Health Transformational System? If yes, when do you offer this to new clients?

#	Answer	%	Count
1	During the 1st Month	43.75%	14
2	Other (please specify):	34.38%	11
3	Additional Comments:	18.75%	6
4	No, I do not teach the Habits of Health Transformational System	3.13%	1
5	During the 2nd Month	0.00%	0
6	During the 3rd Month	0.00%	0
7	During the 4th Month	0.00%	0
	Total	100%	32

Important take-aways:

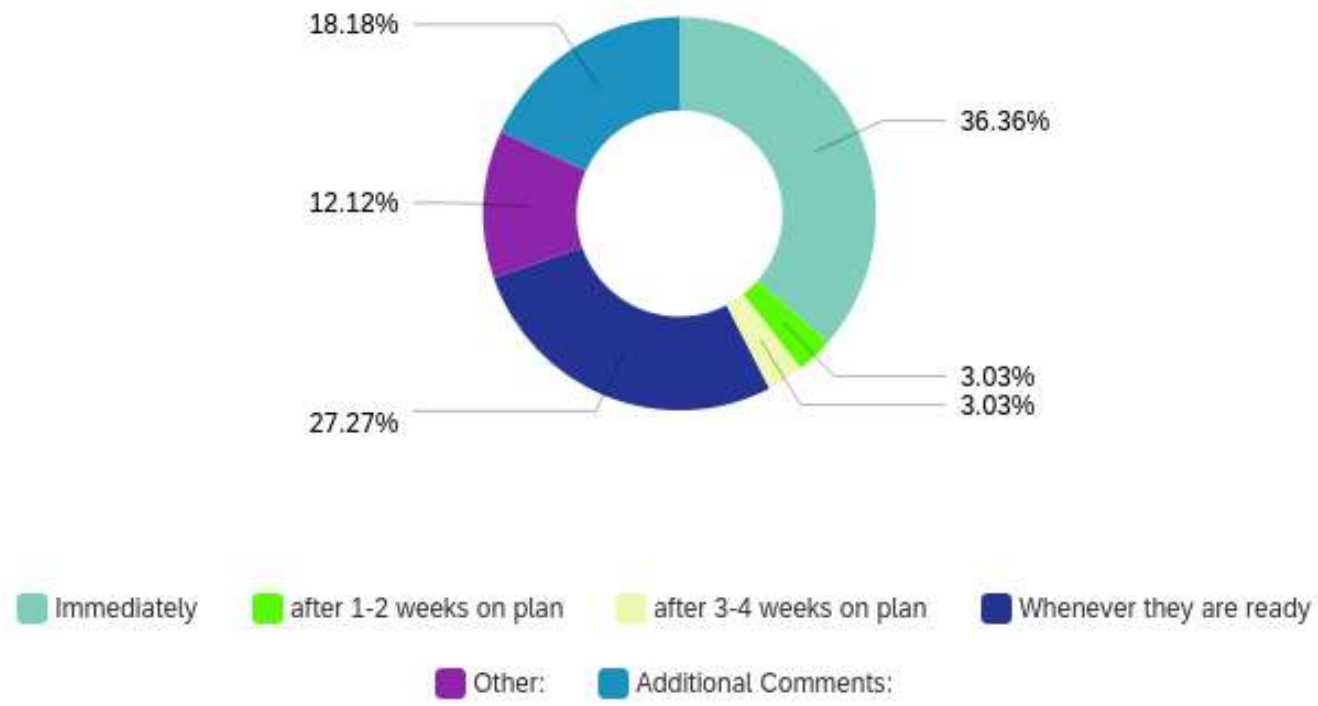
- It is important to purchase the Habits of Health books with the Client's first order. Recommended to purchase the Essential kit with the HOH and LifeBook included.

- Begin teaching/discussing the Habits of Health during the Health Assessment.

- The HOH system distinguishes **OPTA**VIA from a diet

- HOH system is introduced initially, however Coaches choose how to introduce (either with the books or online)

When do you typically train to offer Coaching?



When do you typically train to offer Coaching?

#	Answer	%	Count
1	Immediately	36.36%	12
2	Whenever they are ready	27.27%	9
3	Additional Comments:	18.18%	6
4	Other:	12.12%	4
5	after 1-2 weeks on plan	3.03%	1
6	after 3-4 weeks on plan	3.03%	1
7	after 4 or more weeks on plan	0.00%	0
	Total	100%	33

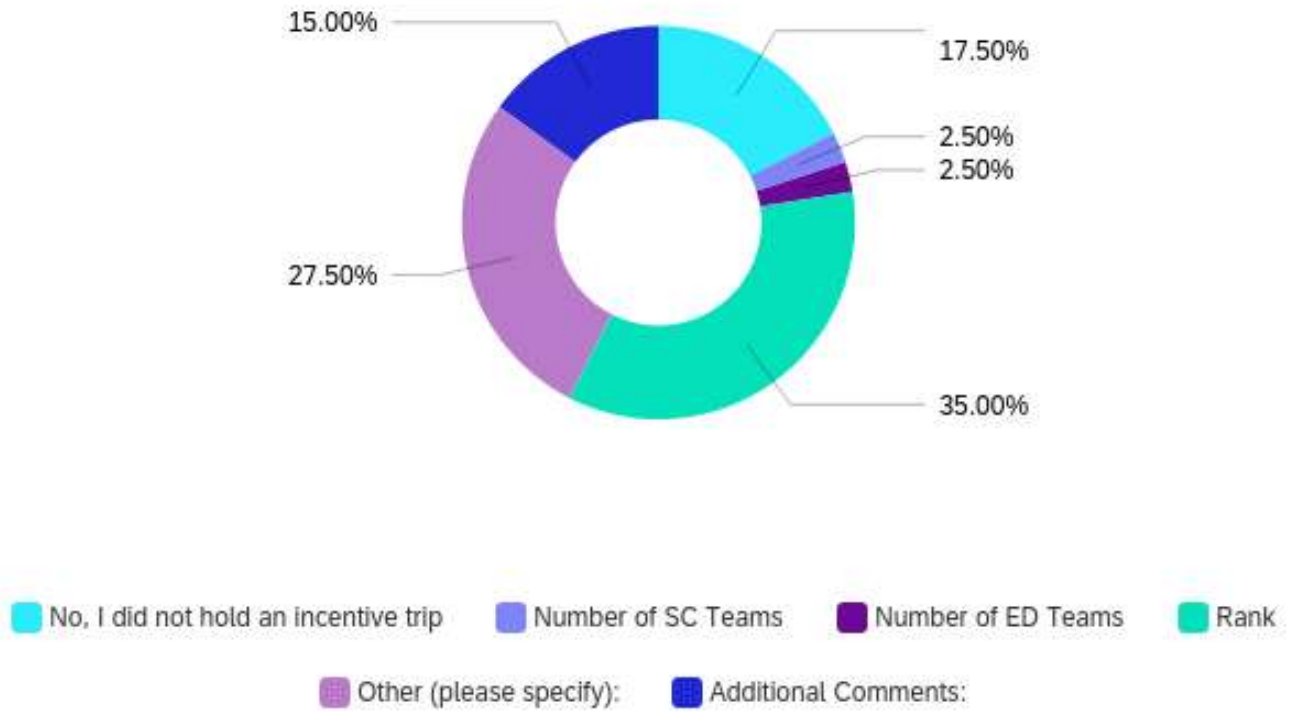
Important take-aways:

- "Dripping" coaching is an important component of Leader's weekly Tip calls, especially at the week 1 celebration call.

- The offer of coaching is dependent on the individual's goals and readiness. They take things at the pace of the individual Client

- Look for strategic partners who are fully integrated in the program

Did you hold an incentive trip? If so, what were the requirements to attend?



Summary of Incentive Trips:

- Leaders use Rank as the single qualification for attending incentive trips
- Coaches often hold events with other organizations
- For large/blended organization events, each team has their own set of qualifications for rank
  - Common ranks include: FIBC and above, ED and above
- Incentive trips and events are more for awakening and mindset rather than transactional training
- The COVID-19 pandemic has impacted Leaders ability to plan incentive trips

Health Assessment Summary:

- Number of Health Assessments completed it dependent on the goals of the individual.
- Encourage 4-6 per month however, this varies based on the Coach and their individual goals for their business.
- Recommend first 3-5 health assessments preformed with Business Coach
- Coaching is often dripped into the Health Assessment

Coach Explore Summary:

- Celebration calls, commonly known as “Tip calls” are geared towards the Coaching opportunity.
- No set number of Coach Explores to preform each month. Ideally as many as possible however, this depends on the individual
- Leaders identify strategic partners

Please describe any trainings, boot camps or masterminds you completed this quarter.

- There is a strong emphasis on collaboration. Leaders will refer their Coaches to other organization's trainings (i.e., bootcamps, power hours, etc.).

- Each organization has a unique training system which offers a variety of events at different times and days throughout the week, month and quarter.

Training Focuses

- Mindset Shifts
- Fear of putting yourself out there
- System changes
- Coach training and sponsoring
- Social Media training
- Overcoming Objections
- Client Acquisition
- Connect Reports
- Duplication



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Daily/Weekly Trainings by various Leaders

- Power Hours focused on Social Media
- Monday Night Calls for Coaches and Clients. Shifting to Coaches only in the second half (Clients invited)
- Tuesday morning trainings are open to newer FIBL legs
- Big team event every Thursday night
- Saturday morning organization weekly trainings
- Coach huddles community Thursdays at noon, processes and systems, personal development
- Saturday A-Team Calls - highlights upcoming Leaders

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Bootcamps

- 6-week FIBC Bootcamps
- 6-week go ED Bootcamp
- Grow to Senior Coach group and Grow to ED group meet 3x/week

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Additional Trainings

- Smaller group trainings focused on ranking up:
  - To qualify for this call, you must
    - submit a MAP
    - have a certain amount of FB friends
    - commit to sessions
    - do the homework
- Grow to ED & Grow to FIBC = small weekly meetings throughout year via Zoom.
- Compensation trainings
- Power groups running to go SC to ED

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Important take-aways:

- Bootcamps are strategically scheduled based on specific goals of the Leader, company initiatives (Convention), or Leader events
  - Ex: If there is an event in April that is for qualified FIBCs, there may be a 6-week bootcamp for EDs to get them to FIBC
- Many trainings are rank based
- Topics vary based on needs of organization
- Most Leaders hold a weekly training via zoom
  - Some are Coach focused and some are Client/Coach focused

Upcoming events in 2022

Event Name	Date	Leaders Involved
Virtual Events	January & February 2022	Dan Bell
Awaken	End of February 2022	Dan & Megan Valentine
Level Up	March 2022	Doug Wood, Bekah Tinter
Qualifying Event	March 2022	Eric & Raquel Hunsberger
Grow Global	April 2022	Dan Bell, Dr. A
Go FIBC Mastermind	May 2022	Dan & Megan Valentine
4 week Bootcamps	June & July 2022	Dan & Megan Valentine
OPTAVIA Convention	July 2022	All
Big Thinker	Fall 2022	Suzy Heyman, Carol Coufal
IND Event (Tentative)	Fall 2022	Jennifer Morris & Tom Sarah
Boot camps	November & December 2022	Dan & Megan Valentine
FIBC Qualifying Retreat		Lenee & Patrick Rogers

What common reports do you train to run in Connect?

Answer	%	Count
Projected OPTAVIA Premier (Org)	12.93%	15
Projected OPTAVIA Premier (Frontline)	7.76%	9
All Coach Report (Org)	6.03%	7
Close to Rank (ED - Frontline)	5.17%	6
Close to Rank (ED - Org)	5.17%	6
Client Report (Org)	4.31%	5
Client Report (Org)	4.31%	5
Close to Rank (Senior Coach - Org)	4.31%	5
All Coaches Report (Frontline)	3.45%	4
Client Report (Frontline)	3.45%	4
Client Orders (Org)	3.45%	4
Close to Rank (FIBC - Frontline)	3.45%	4
Additional Comments:	3.45%	4
Close to Rank (Senior Coach - Frontline)	3.45%	4
Close to Rank (Senior Coach - Frontline)	3.45%	4

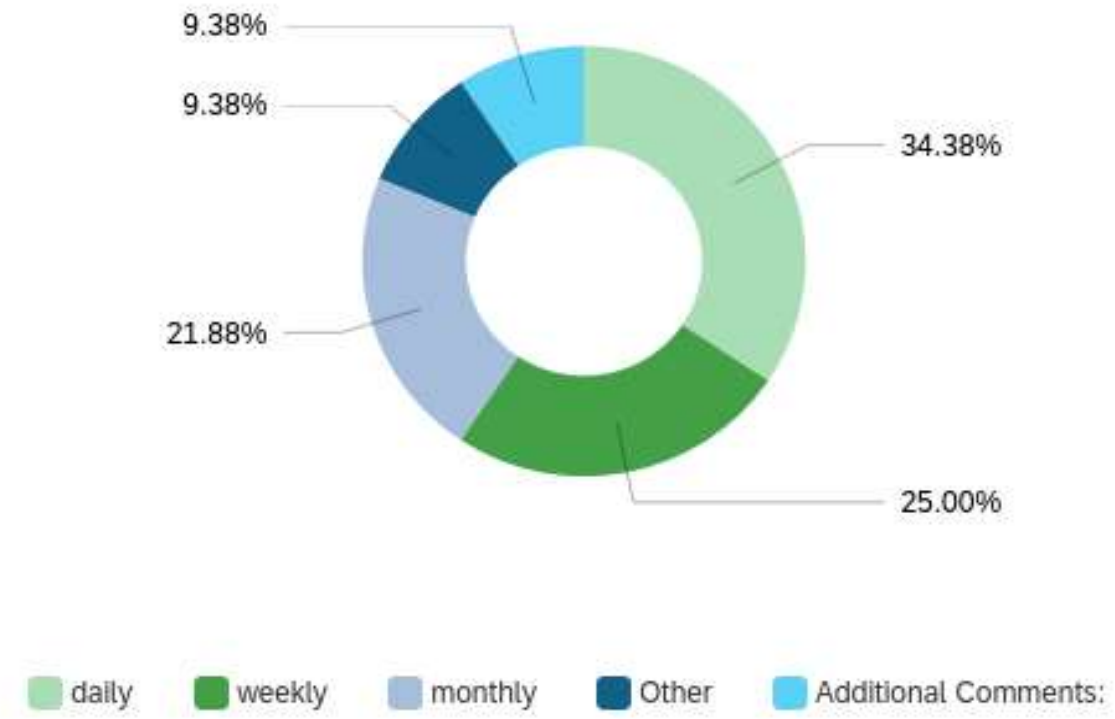
What common reports do you train to run in Connect?

Answer	%	Count
Client Orders (Frontline)	2.59%	3
Canceled Projected Premier Report (Org)	2.59%	3
Eligible for Client Acquisition Bonus (Org)	2.59%	3
Eligible for Client Acquisition Bonus (Frontline)	2.59%	3
Close to Consistency (org)	2.59%	3
Renewal (Org)	2.59%	3
Other	2.59%	3
Close to Consistency (Close to FIBC consistency - frontline)	1.72%	2
Close to Consistency (close to Coach consistency - frontline)	1.72%	2
Promotion Report	1.72%	2
New OPTAVIA Coaches (Org)	1.72%	2
Team Rank (Currently preforming above HRA)	1.72%	2
Team Rank (Currently preforming BELOW HRA)	1.72%	2
Renewal (Frontline)	0.86%	1
Expiring Rewards	0.86%	1
Certification	0.00%	0
Total	100%	116

Important Take-aways:

- The Watch List – Coach created platform used by overwhelming majority if not all Leaders daily
- Request for "How-to pull report(s)" tutorials on YouTube

How often do you train your Coaches to run Connect Reports?



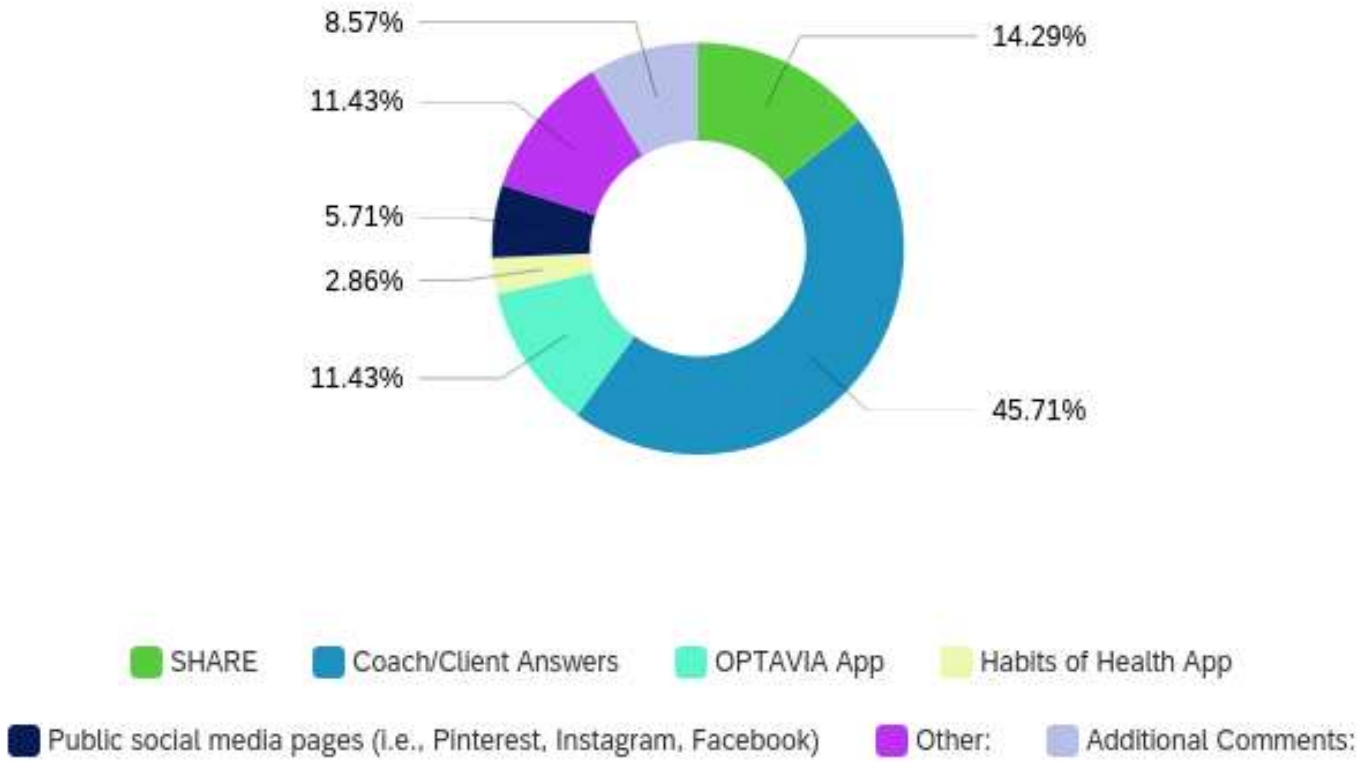
How often do you train your Coaches to run Connect Reports?

#	Answer	%	Count
1	daily	34.38%	11
2	weekly	25.00%	8
3	monthly	21.88%	7
4	Other	9.38%	3
5	Additional Comments:	9.38%	3
6	bi-monthly	0.00%	0
7	quarterly	0.00%	0
	Total	100%	32

Important take-aways regarding MAP usage:

- Use corporate's training video on how to use MAP
- There is a need for a MAP beyond FIBC
- Fill out and submit MAP at the very end of the Month
- Leaders help their Coaches fill these out
- Leaders will not work with their Coaches unless they've completed their monthly MAP or similar document

What are the Top 2 OPTAVIA Systems you use in your business?



What are the Top 2 OPTAVIA Systems you use in your business?

	Answer	%	Count
1	Coach/Client Answers	45.71%	16
2	SHARE	14.29%	5
3	OPTAVIA App	11.43%	4
4	Other:	11.43%	4
5	Additional Comments:	8.57%	3
6	Public social media pages (i.e., Pinterest, Instagram, Facebook)	5.71%	2
7	Habits of Health App	2.86%	1
8	Agents of Transformation	0.00%	0
9	OPTAVIA Learn	0.00%	0
	Total	100%	35

General Interview Take-aways

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Additional Feedback:

- When onboarding a new Client or Coach, more training can be a detriment. It's important to connect them strongly with the components more so than formalized training.
- Support for the deaf community - They prefer to have the interpreter as opposed to captions
- Support for the visually impaired - Habits of Health Transformational System Audio Book would be helpful



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Requested Training

Leaders would like to see more trainings from the company on these topics:

1. **OPTA**VIA Connect
   - Create a dummy account to demonstrate various scenarios to pull reports
   - Create a YouTube "How-To" series for generating Connect reports

2. **Compliance Training**

3. Transition and Maintenance

4. How to support Clients in HK/SG

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Overall Growth

Growth from October 2021 – December 2021

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To Be Added

Coach Provided Resources

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Resources from Participants

Bekah Tinter, Dan & Megan Valentine, Doug Wood,
Melissa Tarleton, Michelle Heyman, and Suzy Heyman

Bekah Tinter

- 2022 Training Outline
- Activity Results Tracker for Coaches
- Engagement Charts
- Skill and Engagement for Core Coach Competencies
- Social Media Showcase
- The Crazy Year Pt. 2 Recorded Training
- Winter Bingo

Doug Wood

- Building Your Confidence as an **OPTA**VIA Coach
- **OPTA**VIA – MLM or NOT?
- Our Program Is Simple If We Keep It That Way!
- Rewards of Coaching Hosted by Doug & Thea Wood
- Unplugged and Hot Popcorn Topics Hosted by Doug Wood
- Who Makes GREAT COACHES?

Other Participants

- **Dan & Megan Valentine**
  - Current “Go ED Bootcamp” Facebook Group
  - Podcast with 9 Different Bootcamps and 45 Trainings
- **Melissa Tarleton**
  - Coaching Resource Library Team Trello Board
    - Good examples: 9/26/2021, 10/4/2021, 10/11/2021, 10/18/2021, 10/25/2021
- **Michelle Heyman**
  - Connect Snapshot Guide
- **Suzy Heyman**
  - Summit Agenda

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