

METABOLIC BALANCE
Offboarding Guide
FOR COACHES IN TRAINING





metabolic **balance**

Congratulations!

COACH OFFBOARDING GUIDE

This Offboarding Guide is intended to serve as your ultimate guide or cheat sheet as you move forward with working with your clients.

Please store this guide in a safe place where you can easily reference it whenever questions arise in the future.

We have shared quite a few different logins with you at this point, and I know it can be confusing what to use and where. We've created an informational resource that you can use as your guide for where each login is required.

[LOGINS DESCRIBED](#)

We've also created this step-by-step guide that walks you through a brief overview of coaching clients.

[STEP-BY-STEP CHECKLIST](#)

Mandatory Forms

PROVIDE THESE FORMS TO YOUR CLIENTS



PERSONAL PROFILE FORM

Each client must provide the required information, including the Medical Doctor name, and sign the Personal Profile, BEFORE the blood work can get done. The Coach must store the Personal Profile Form in the client files securely and have it available at any time upon request.

When you request a plan, you have to check off that the client has signed the Personal Profile and Consent Form in order to continue with the plan request.



CONSENT FORM

Each client must read and sign the Consent Form, BEFORE the blood work can get done. The Coach must store the Consent Form in the client files securely and have it available at any time upon request.



LAB REQUISITION: (FORM IS LAB-SPECIFIC)

Client will be required to bring this form with them to the lab. In provinces other than AB/ON/BC, the client needs a MD stamp on it first.



PRIVACY POLICY (OPTIONAL)

We have a template in our Coach Hub Resource Library that you may use as a guideline



TERMS OF SALE (OPTIONAL)

Every business needs a Terms of Sales policy in place by law. This form is acting as a template for you in case you do not have such a form in place. This form includes the language and information required by the Consumer Protection Act (CPA) in a form that would not require you to have a separate written agreement with your clients. Please note that this was made by a lawyer in Ontario and might be different in other provinces. Feel free to adjust it for your own needs.



INFO LETTER FOR MEDICAL DOCTOR (OPTIONAL)

The Information letter should be used in the case that your clients Medical Doctor is involved in the progress. This can be the case if your client wants to share the results with your Doctor.



PHASE TWO QUESTIONNAIRE (OPTIONAL)

You may use this as a guide



TESTIMONIAL FORM (OPTIONAL)

To capture a client success story formally.



Important Links

Once again thank you so much for your participation in our course and congratulations on completing your training!

You'll always have access to our Coach Hub - a platform that has been created as a resource for you as a Metabolic Balance Coach. We are constantly updating this Hub, so please check in with it frequently & be sure to check there if you have any questions.

[VISIT OUR FAQs](#)

[LABS & BLOOD WORK PAGE](#)

[VISIT THE COACH HUB](#)

[BUILD YOUR BUSINESS](#)

Our support team can be reached at team@metabolic-balance.ca