

Order of Events and Needed Information after contract is signed:

Done	When / What	Item	Notes
	After contract is signed	<ul style="list-style-type: none"> Annual Client Information and Metric Collection Form Management Objectives Survey circulated 	Complete the form while on the phone/in person. Highlight the TO DO items and indicate who is doing what. Email your contact person a copy of the form. Set a date as to when it will be completed and sent back to you.
	Launch preparation	<ul style="list-style-type: none"> Launch poster – emailed to contact person 2 weeks prior to launch to post/email to staff. One week prior, email reminder to all staff via contact person. 	
	Launch	<ul style="list-style-type: none"> Interactive Activity [optional] Power point presentation Customized information flyer - printed Consultation sign up sheet Wellness committee sign up sheet Consultant Binder Wellness office materials [for consultants] Name tags for consultants 	<ul style="list-style-type: none"> Goals of program launch to be defined. Client specifics added, content remains the same. Sign up sheet for initial consultations following the launch. Binder and materials prepared for consultants
	Consultant binder	<ul style="list-style-type: none"> Background consulting information Powerful coaching questions Wellness office sign Employee checklist Missed appointment log Data collection logs 	<ul style="list-style-type: none"> Coaching material Coaching material In color Contact person will provide you
	Wellness office materials	<ul style="list-style-type: none"> Articles File folders Filing cabinet [if it is not provided] Office supplies Box of Kleenex Stability ball Tubing and/or set of dumb bells Scale [body fat scale is preferred, but not necessary] Measuring tape Calculator Note paper Consultation appointment slips 	
	First wellness committee meeting	<ul style="list-style-type: none"> Wellness Committee Objectives Survey circulated 	