FolarraStudio

Nutrition Coach Client Planner

learn · plan · thrive

PRINTABLE · CLIENTS, JOBS & MONEY

This Planner Belongs To

for nutrition and wellness coaches (non-medical)

BUSINESS NAME _____

OWNER _____

PHONE / EMAIL _____

SERVICE AREA _____

STARTED ON _____

How to use this planner

- Print the whole planner once, then print extra copies of the pages you use most, such as the Discovery Call Form and Client list pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Fill in a client profile for each new client and log every job on the day.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

My business word for this year

Why I love this work

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Discovery Call Form

details for every new client

CLIENT _____ PHONE _____

ADDRESS _____ EMAIL _____

DATE _____ REFERRED BY _____

Goals

Current habits

Food preferences

Referred to doctor if needed

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
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- [ ]
- [ ]

Client List

everyone you work with

CLIENT	PHONE	EMAIL	SINCE	NOTES

Client Profiles

the details that matter

CLIENT _____

EMAIL _____

PHONE _____

GOAL _____

START DATE _____

PACKAGE _____

NOTES _____

CLIENT _____

EMAIL _____

PHONE _____

GOAL _____

START DATE _____

PACKAGE _____

NOTES _____

CLIENT _____

EMAIL _____

PHONE _____

GOAL _____

START DATE _____

PACKAGE _____

NOTES _____

CLIENT _____

EMAIL _____

PHONE _____

GOAL _____

START DATE _____

PACKAGE _____

NOTES _____

Session Log

every job, recorded

DATE	CLIENT	FOCUS	PAID	NEXT
			☐	
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Services & Prices

what you offer

SERVICE	PRICE	TIME	NOTES
Starter session			
Monthly coaching			
Meal plan template			
Grocery tour			

Weekly Schedule

the week at a glance

WEEK OF _____ NOTES _____

TIME	MON	TUE	WED	THU	FRI	SAT	SUN
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
13:00							
14:00							
15:00							
16:00							
17:00							
18:00							
19:00							

Session Notes

one session per page

CLIENT _____ DATE _____

SESSION NO. _____ FOCUS _____

Wins since last time

Discussion

Actions agreed

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

Next session

Client Goals

what each client is working on

CLIENT	GOAL	START	TARGET	MET
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Habit Check-In

weekly

CLIENT _____ MONTH _____

HABIT	W1	W2	W3	W4	W5	W6	W7	W8

Resources Shared

handouts and recipes

DATE	CLIENT	RESOURCE

Invoice Tracker

get paid on time

INVOICE NO.	CLIENT	DATE	AMOUNT	DUE	PAID
					☐
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Income & Expenses

money in, money out

MONTH _____ GOAL _____

DATE	DESCRIPTION	CATEGORY	IN	OUT

TOTALS _____

Yearly Overview

the business at a glance

YEAR _____ GOAL _____

MONTH	JOBS	INCOME	EXPENSES	PROFIT	NEW CLIENTS
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					
Total					

Notes



FolarraStudio

Thank you!

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