Navigating your clients through their InsideTracker analysis

InsideTracker
Pro

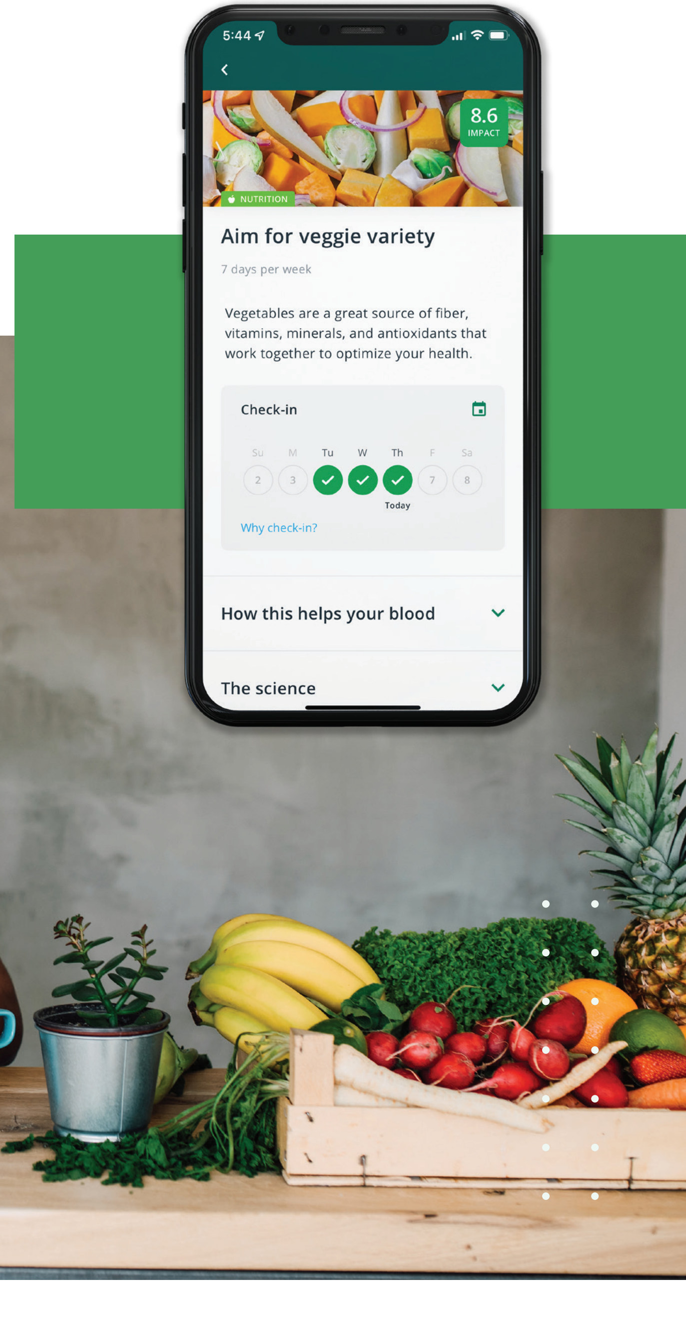
As an InsideTracker Pro,

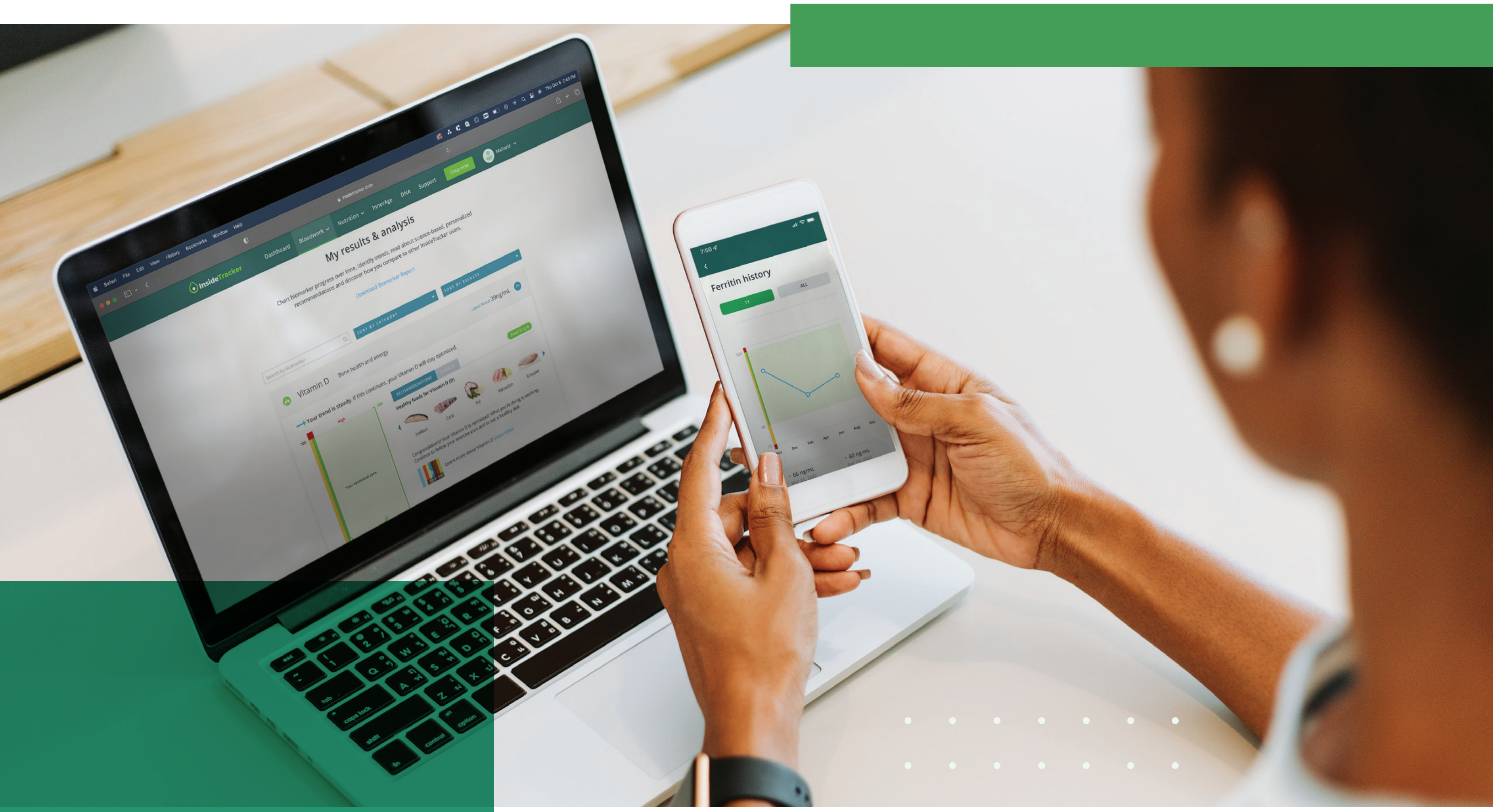
you have the advantage of leveraging the personalized insights and guidance provided by InsideTracker with your clients. The objective data and science-backed guidance that we provide can have an even greater impact when combined with your professional expertise and personal relationship with your clients.

To help you deliver high-quality, personalized services, we've outlined a process to help you leverage both **quantitative data** (InsideTracker) **and qualitative + contextual factors** (relationship with your clients). This guide is not meant to be a diagnostic tool, but rather a framework by which you can get started using your clients' results to implement a personalized course of action while staying within your scope of practice.

Follow these simple steps to integrating InsideTracker insights into your practice:

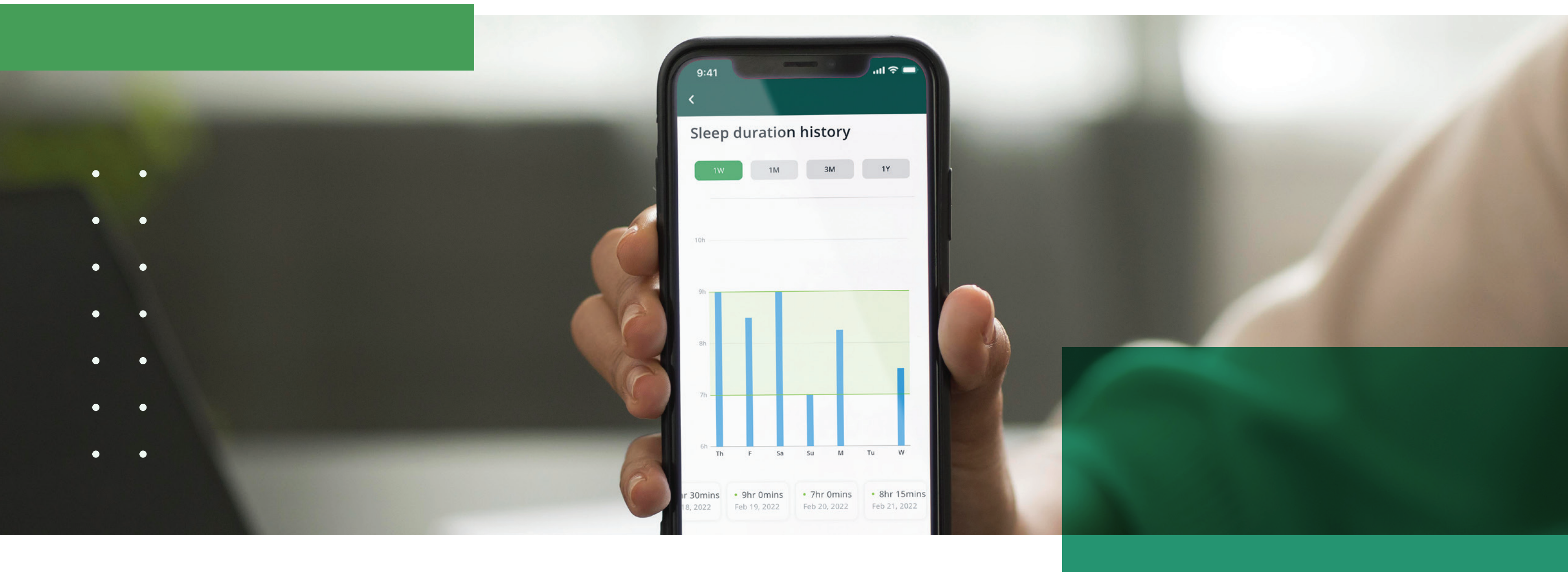
1. **Start with the objective data**
2. **Put the data in context**
3. **Use data + context to set an action plan**





1. Start with the objective data

- When a client has new results available to view, you'll be notified via email.
- Log in to your **Coach Dashboard** to review their results:
  - Scan their results and familiarize yourself with their optimal ranges, then focus on markers in the following priority order: At Risk (red), Needs Work (yellow), then Optimized (green)
  - You can review InsideTracker's description of biomarkers, interpretation of high or low results, and the recommendations associated with unoptimized markers by clicking "See Bloodwork" from the client's page.
  - Using the groups of biomarkers provided in your Coach Dashboard (e.g., Inflammation, Stress, Recovery, Endurance, etc.), consider whether there is a particular group in which your client has multiple markers that are not optimized.
  - When data from multiple blood tests are available, review past results to look for trends. Are there markers that are consistently unoptimized?
- Take the **Coach Dashboard tour** as a refresher if needed.



2. Put the data in context

- After reviewing your client's results, consider how any unoptimized biomarkers may relate uniquely to your client and plan to discuss these with your client.
- This is where your relationship with your client comes into play! You have the benefit of **facilitating a conversation** that goes beyond their objective data points and takes into consideration factors such as life events, changes in their work or training schedule, specific seasons, etc.
- **Suggested questions and discussion topics for your clients:**

  - Consider the timing of their blood draw:

    Were there any major shifts in their schedule or exercise (quantity or intensity) in the days leading up to their blood draw?

  - Stress management:

    Have they experienced or perceived physical, mental, and/or emotional stress leading up to the blood draw?

    What is their overall attitude and approach toward managing stress?

  - Rest and recovery:

    How is their sleep?

    What strategies for recovery do they currently have in place?

    Are they fueling appropriately and sufficiently?

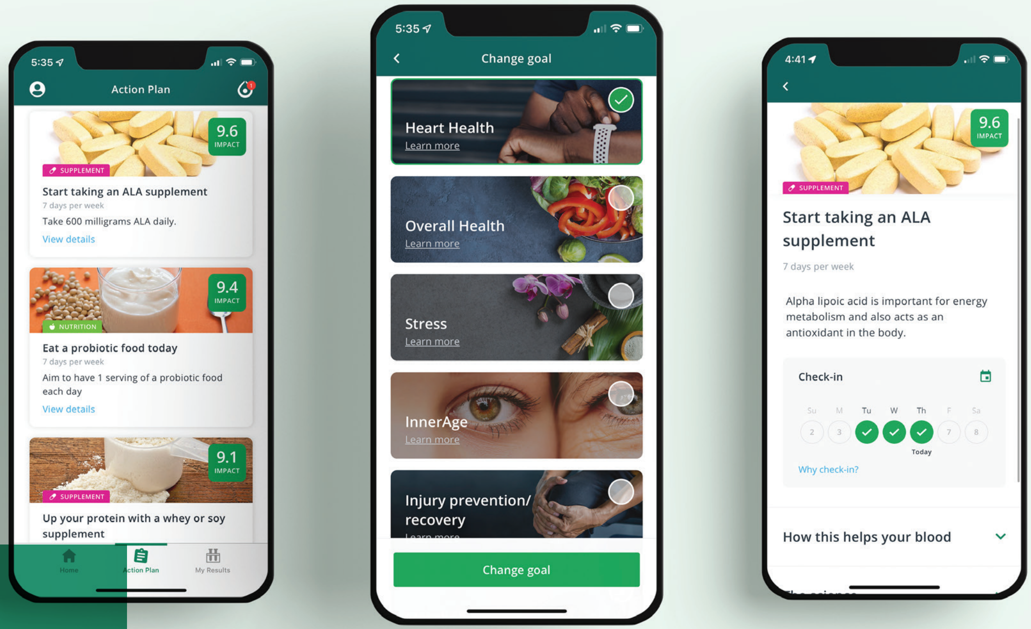
  - Current exercise regimen or season:

    Are there any key events, races or competitions on their calendar?

    How might their current training regimen be influencing their results?

    Discuss their weekly training schedule. Is there a high concentration of stress-inducing events or strenuous efforts?

    Leverage this information to plan for your client based on the specific timeline associated with their goals.



3. Use data + context to set an action plan

- **Set an InsideTracker Action Plan**
  - InsideTracker prioritizes the highest-impact recommendations based on the individual's selected goal, but you can still help, especially with implementation strategies.
  - Because you have the advantage of having a relationship with your client to provide additional context, we encourage you to help your client put actions in their plan that are reasonable for them.
    - For example, a client who is new to implementing diet and lifestyle changes may need to start with 2-3 recommendations, whereas a more seasoned "optimizer" can potentially handle more.
  - Refer to our **step-by-step instructions to create an Action Plan** as needed.
  - Once their action plan is set, encourage your client to use the daily check-in feature of the InsideTracker action plan to help them turn their action items into habits.
- **Issue your additional guidance**
  - This is where your particular area of expertise comes into play. Your client sought you out for your services specifically, so you're the expert here.
  - Based on your review and conversation with your client, consider any factors that are within your control, such as:
    - An athletic coach whose client has high inflammation may consider adjusting the volume or intensity of their training regimen to ensure adequate recovery time.
    - A registered dietitian should incorporate the foods and supplements in their client's InsideTracker Action plan into the weekly meal plans they provide.

- An executive coach may facilitate personal/professional development exercises or practices to help lower stress levels.

- **Conduct ongoing check-ins and establish a routine blood testing schedule**
  - Continue your established check-in protocol with your clients, but consider how you can help your client stay accountable to their InsideTracker action plan by asking questions, such as:

    How has their action plan been going? Are they completing daily check-ins?

    Are they experiencing any changes as a result of the actions in their plan?

    Does the number of recommendations in their plan feel attainable?

    If you provided any additional guidance based on their last results, how have they felt or performed as a result?
  - Determine an appropriate blood testing schedule so that you have a clear timeline for when you will measure progress. Check out our **guidelines for regular blood testing** to help determine the right timeline for each client.

The process of not only getting blood drawn, but then interpreting what that analysis means can be daunting. While InsideTracker breaks down that complex information into actionable steps, you have the opportunity to further support and guide your client to reaching their health and fitness goals.

Do you have more questions on how the process works?
Contact ITPros@InsideTracker.com for support.