

Marquee Health Coach Program Manual – Member Engagement Protocols v.2025_Condensed Messaging

Best Practices for Engaging Members: EMAIL COACHING

1. Welcome Email / First Session

- Sent **within 2 business days (3 business days when necessary)** of receiving the assignment.
 - If the member scheduled via the online scheduler, the message is sent on the **requested date/time**.
- Email is personalized using:
 - Initial Health Assessment (IHA) (if applicable)
 - Tobacco Questionnaire (if applicable)
 - Any notes provided
 - Program details that are relevant – deadlines etc.
- Welcome Email includes:
 - **Coach Bio** (PDF)
 - **Maximizing the Coach Session** document (PDF)

2. IF no Response to Welcome Email/1st Session

- If the member does not respond, the coach sends a follow-up **within 3–5 business days** to engage.

3. Task Management

- Coach schedules a **Task to send next engagement attempt** after sending any email to the member.
- There must always be an **active Task** for every coaching member.
 - **Exception:** CHC programs.

4. Coach Response Time

- Coach responds to member messages within **3–5 business days**.

5. Coaching and Goal Setting

- Goal review (completion, revision, or setting a new goal) occurs **approximately every 4 weeks** or as appropriate.

6. Inactive Member Outreach

- A member is considered inactive if they **stop responding** to coach emails.
- Coach continues outreach **bi-weekly** for a total of **12 weeks**.

Required Outreach Minimum

- **At least 5 emails** over the 12-week period
- Plus 1–2 phone attempts (optional, if appropriate)
- **If the outreach minimum is met** and the member still does not respond, the coach **may close the member's Case** in CoachSpect with the reason: **“Inactivity.”**
- **Review sample message in “Commonly Used Language”**

Best Practices for Engaging Members: TELEPHONIC/VIDEO COACHING

1. Member Initiates Enrollment

- Member contacts via **phone or email** requesting Phone/Video coaching **or** uses the **online scheduler** to request a session.
- At intake (phone/email):
 - Member is informed that a **health coach will reach out within 3–5 business days** to complete first session or schedule first session.
- If using **online scheduler**:
 - Enrollment email is sent confirming **topic, date, and time** of first Phone/Video session.

2. Assignment

- Site Administrator assigns member to a coach.

3. First Session Scheduling

- Coach schedules first Phone/Video session:
 - **Within 3–4 business days** of assignment **OR**
 - At the **preferred date/time** if indicated by member at enrollment **OR**
 - At the **date/time requested using the online scheduler**. Do not reschedule phone/video requests from the online scheduler – if a reschedule is necessary, get approval from your Team Lead first.
- Coach sends **Welcome Email** within **2 business days (3 business days when necessary)** of assignment, including:
 - Coach Bio (PDF)
 - Maximizing the Coach Session document (PDF)
 - Confirmation of date/time **with time zone** of scheduled session
- Coach creates Task of phone/video session date/time and sends a calendar invite to member via Coachspect.

4. Follow-Up Session Scheduling

- Coach schedules each follow-up call/video session **in collaboration with the member** based on agreed frequency.

5. Missed Sessions

- **Phone Call Missed:**
 1. Leave message asking for return call; try back in 5 minutes.
 2. If no call back from member, call and leave a second message with new scheduled date/time selected by coach (within 1 week if possible) that coach will call again. Coach calls as scheduled/stated in voice message, even if member does not confirm.
 3. Always follow up each call (completed or missed) by creating a **Coachspect Task and sending a calendar invite to member (via CS) of next session date/time**.
- **Video Session Missed:**
 1. Coach waits **at least 10 minutes (or time specified by client eg. 15 min for Grokker)**.

2. If member misses video call, schedule follow up video session, create a CoachSpect Task with date/time of video session, and send calendar invite to member (via CS Task).
3. Conduct next session as scheduled even if member did not accept invitation.

6. Inactive continued Engagement attempts:

- Coach continues outreach via **calls/videos and emails** for **12 weeks** if member is inactive.
- **Required Outreach Minimum when member is inactive:**
 - Phone Coaching Outreach – 5 follow up calls over 12 weeks.
 - Video Coaching Outreach - The first scheduled video session and the follow up video session scheduled after missed first video session. The 3 additional outreach attempts via email.
 - **1–2 emails** from CoachSpect (optional, if appropriate)
 - If outreach minimum is met and the member does not respond, coach **may close Case** with reason: **“Inactivity.”**

7. Special Considerations

- For RAS programs (e.g., Outcomes, UBreathe):
 - Track program dates and plan outreach accordingly.
- If unsure, check with **Team Lead**.

Follow-Up After Completion of RAS/Wellness Points/My Rewards Programs

Purpose

To guide coaches in managing member engagement and ongoing coaching after successful completion of RAS, Wellness Points earning, or My Rewards incentive programs.

1. Email-Based Coaching

1. After the last required session for the program, coach sends an **email (see sample below)** informing the member:
 - They have **successfully completed** the program requirements.
 - They **still have access** to continued health coaching if interested.
 - Provide a **date by which they can accept** ongoing coaching (e.g., 2 weeks later).
 - Coach includes an **Exit Survey link** in email
2. Coach **closes the current Case** with the date of the last completed session.
3. If the member **accepts continued coaching**:
 - Coach enrolls them in a **new program** for ongoing coaching.
 - Sends the **first session of the new program**.

Sample Language (Email):

Congratulations! Your response to Session #X satisfied the requirements of your XYZ program (e.g., RAS, My Rewards). You have access to unlimited health coaching, and I am happy to continue to work with you if you find it beneficial. Please let me know by [date] if

you are interested in continuing health coaching. Also, please share your feedback via this Exit Survey link: [[See Exit Survey Links and use appropriate based on Partner/Client](#)]

2. Phone/Video-Based Coaching

1. During the final session that completes program requirements:
 - Coach informs member they have satisfied requirements.
 - Offers ongoing coaching.
 - Update if necessary and complete **Goals and Activities**.
 - Coach completes the **Post-Assessment Survey** with member in real time.
2. If the member **declines**:
 - Coach closes the Case with the date of the last session.
3. If the member **accepts**:
 - Coach closes the Case with the date of the last session.
 - Enrolls member in **new program** for ongoing coaching.

*Please note: **For all methods of coaching (phone, video, or email)**, if a member opts in to continue with no-incentive coaching but does not engage with coach, the coach is only required to make **two** engagement outreach attempts before marking them as inactive and closing out their case.

3. Multi-Program Participants

- If the member is eligible for multiple incentive-based coaching opportunities:
 - Continue coaching as appropriate.
 - Close and re-enroll Cases **as required**.
 - Coach must attempt **at least 2 additional outreach contacts** if the member stops responding before closing for inactivity.

Quick View - Health Coach Steps

1. Add new coaching member to Coaching Member Spreadsheet saved on sharepoint
2. Create/Enroll Case for new coaching member in CoachSpect.
3. Add Phone/Video/In-Person Coaching sessions as Task in CoachSpect and to Outlook Calendar (identify as phone/Video calls w/name of member and client) and add Task in Case (select send calendar invite within CS). CS will also send out the calendar invite and a reminder 24 hours in advance, if you select this – please do so if you have an email address for member.
4. Schedule phone coaching members ASAP after assignment, send email notification of appointment (if email is available) and call as scheduled.