

Meal Planning Assessment Tool

Collect the right information so you
can build great nutrition plans.

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Introduction

Before you start meal planning... hold up!

We know you are excited to start using That Clean Life for Business with your clients. But before you dive right in to creating a super awesome nutrition plan, you must conduct a meal planning assessment.

In order to conduct a great meal planning assessment, you will need a tool that will help you to *really* get to know your client and collect the right information so that you can deliver the absolute best service. This is exactly why we've created you this Meal Planning Assessment Tool, so you can ensure you are asking the right questions to get quality data and enable yourself to create plans that will help your clients achieve success and ultimately grow your business.

How to Use

We've made the Meal Planning Assessment Tool available via Google Forms, so that you can make a copy and modify it to suit your needs and add your custom branding.

To make a copy of this tool that you can modify, please follow these steps:

Step 1 Visit → [Meal Planning Assessment Google Form](#)

Step 2 Sign in to your Google account

Step 3 Click → *Make a copy*

Step 4 Modify the form to suit your needs

While we've provided you with what we feel are the most important questions for your meal planning assessment, you may want to add questions as they relate to your area of expertise, or even remove questions if you feel they aren't relevant to your client's experience. You can also add your logo to the form and format it to match your branding.

When you have made a copy of the form and modified it, you can integrate it with your other intake forms, add it to your electronic health records software as a digital form, or simply fill it out with your client interview-style at your next appointment.

Once you've completed the assessment with your client, you will have the information you need to use That Clean Life to build your client an epic nutrition plan that will rock their world.

Ready to get to work? Awesome!

Now let's go forth and create awesome plans that will change your clients lives and make this world a healthier, happier place.

Tips & Tricks

✓ Send with pre-filled answers

Save your clients some time by pre-filling answers to some of the assessment questions. This is helpful if a client sent you information previously and you are wanting to build on top of that. Once you've pre-filled your answers, grab your link and you're ready to send it off to your client!

✓ Embed on a website

Wellness business owners can really benefit from introducing automation into their workflows. The Meal Planning Assessment Google Form gives you the opportunity to embed it directly into your website. This provides you with a single location to direct your clients that is safe, secure, and gives you even more insights and control over the client experience.

✓ Integrate with practice management system

If you prefer to keep all of your client data within your practice management system, we've gone ahead and provided a plain text version of the assessment tool. Easily copy and paste the questions into your system's form builder and create a powerful assessment questionnaire with the advantage of having all your client data centralized.

Appendix

Plain Text Version

In addition to the [Meal Planning Assessment Google Form](#), we wanted to provide you with a plain text version of the tool for your use as you see fit.

Pro Tip

It would be convenient to simply copy and paste the questions below into an email and send it off to a client, but that type of client experience would be far from ideal. Instead, strongly consider using the Google Form available above or a similar automated service. You will save time and provide a more branded, secure and user-friendly experience to your clients.

Tell Me About You

Full Name

Age

Height

Current Body Weight

Ideal Body Weight

Do you want to see changes in your body weight or composition?

If so, describe the types of changes would you like to see.

What are your health, lifestyle and dietary goals?

Have you ever followed a diet?

If so, describe your experience.

What do you hope to achieve through working with a nutritionist?

Tell Me About Your Current Lifestyle

Do you exercise regularly? Yes No

If Yes, how often and what types of exercise?

Do you feel your current diet is healthy? Yes No

If No, what do you think your current diet is lacking?

Do you have any digestive issues? Yes No

If Yes, what kind and how often?

Do you have a bowel movement every day? Yes No

If No, how often?

Rate your average daily energy on a scale of 1 to 10

	1	2	3	4	5	6	7	8	9	10	
Low Energy	<input type="radio"/>	High Energy									

Tell Me About Your Current Diet

How many times do you eat per day?

Breakfast Describe your typical Breakfast.

Breakfast What time of the day do you eat Breakfast?

Lunch Describe your typical Lunch.

Lunch What time of the day do you eat Lunch?

Dinner Describe your typical Dinner.

Dinner What time of the day do you eat Dinner?

Snacks Describe your typical Snacks.

Snacks What times of the day do you eat Snacks?

How many meals per week do you eat out? None 1 to 2 3 to 4 4 or more

If you eat out, what is the most common meal you will eat out for?

Tell Me About Your Current Diet

What is your motivation for seeking out a meal plan?

Are there any foods you will not eat due to sensitivities, allergies, or religious reasons?

How much time would you ideally want to spend in the kitchen per day?

Which food prep style best describes you?

- I like to prep food in advance and eat the same meals for a few days
- I want to spend more time cooking and have different meals each day

What are some of your favourite foods to eat?

What excites you about having or following a custom meal plan?

Is there anything that scares you or intimidates you about following a meal plan?

Is there anything else about yourself that you would like to share with me to help in building your meal plan?