

Retention Strategy Checklist for Telehealth Dietitians



Care Standards & Best Practices

- ☐ Did I review the Nourish Standards of Care?
- ☐ Am I structuring a patient's care plan based on the recommended 12 weekly sessions?
- ☐ Am I using the First Appointment Checklist and/or Follow-Up Checklist to guide my session?
- ☐ Am I tailoring session content while following Nourish's Clinical Standards?

Effective Scheduling

- ☐ Am I booking the next appointment during the current session?
- ☐ Am I scheduling follow up appointments 1 week after the initial appointment?
- ☐ Am I confidently recommending weekly sessions early in care?
- ☐ Am I aiming to schedule at least 4 future sessions?

Insurance Reassurance

- ☐ Am I proactively addressing insurance concerns and explaining the Nourish Guarantee?

Identifying Retention Gaps

- ☐ Am I regularly reviewing my 30, 90, 180, and 360-day retention metrics?
- ☐ Am I using retention data to identify where patients may be dropping off and adjusting accordingly?
- ☐ Am I reaching out for support from my CQM when needed?

Gathering & Valuing Feedback

- ☐ Am I inviting feedback during sessions (e.g., "What's been most helpful so far?")?
- ☐ Am I checking my NPS and written feedback for trends?
- ☐ Am I addressing feedback to tailor care more effectively?

Setting Clear Expectations in the Initial Appointment

- ☐ Am I clearly explaining the purpose and structure of initial appointments?
- ☐ Am I highlighting how Nourish's approach is personalized and holistic?
- ☐ Am I setting expectations for follow-up frequency and messaging?
- ☐ Am I asking about the patient's expectations for care?

Retention Strategy Checklist for Telehealth Dietitians Continued



Using Stages of Change & Goal Setting

- ☐ Am I assessing the patient's Stage of Change regularly?
- ☐ Am I collaboratively setting goals using SMART criteria?
- ☐ Am I exploring the patient's "why" behind their goals?
- ☐ Am I asking about confidence levels and barriers when setting goals?

Building Rapport Intentionally

- ☐ Am I spending time creating human connection in sessions?
- ☐ Am I showing curiosity and using open-ended questions to understand the patient's priorities?
- ☐ Am I sharing my expertise when appropriate to build credibility?
- ☐ Am I bringing my authentic self into sessions (not overly scripted)?

Balancing Patient-Led Sessions with Guidance

- ☐ Am I taking a collaborative approach to sessions, allowing the patient to share their priorities and take part in creating goals?
- ☐ Am I validating and reflecting their experiences?
- ☐ Am I exploring their "why" behind changes they want to make?
- ☐ Am I offering directional support when patients seem unsure?
- ☐ Am I offering education and tools to support their choices?

Delivering Clear, Relevant Nutrition Education

- ☐ Am I assessing prior knowledge before teaching a topic?
- ☐ Am I keeping education clear, concise, and goal-oriented?
- ☐ Am I using visuals, screen share, or digital tools to enhance understanding?
- ☐ Am I offering a quick educational "nugget" in the first session?
- ☐ Am I connecting education directly to SMART goals?
- ☐ Am I preparing ahead for likely education topics?

Practicing Motivational Interviewing (MI)

- ☐ Am I setting weekly MI goals for myself (e.g., more reflections, fewer directives)?
- ☐ Am I reflecting after sessions on:
 - "Where could I have asked more open questions?"
 - "Am I affirming the patient's strengths or just their behaviors?"

