

R.O.O.T.S. Method™ Client Transformation Roadmap

Client Name: _____ Date: _____

Primary Health Goal: _____

Section 1: The L4 "Frustrated Seeker" Assessment

Before we begin the clinical process, we must identify the gaps in your previous care. This ensures we are targeting the root cause, not just managing symptoms.

Check all that apply to your previous healthcare experiences: - ☐ I have been told my labs are "normal" despite feeling unwell. - ☐ I feel "unheard" or rushed during standard 7-minute appointments. - ☐ I have been given "pill-for-an-ill" solutions without lifestyle context. - ☐ I am seeking a scientific, data-driven explanation for my symptoms. - ☐ I am ready to move beyond "wellness coaching" into clinical-grade resolution.

Section 2: Your Proprietary Clinical Path

We use the R.O.O.T.S. Method™ to bridge the gap between conventional rigor and holistic depth. Below is your personalized roadmap through our five phases of transformation.

Phase	Clinical Focus	Status	Target Date/Notes
REVEAL	Data Investigation: Functional labs, deep history, and biomarker analysis.	<input type="checkbox"/>	
ORGANIZE	The Clinical Matrix: Connecting the dots between your unique symptoms.	<input type="checkbox"/>	
OPTIMIZE	Physiological Foundation: Stabilizing the gut, sleep, and stress response.	<input type="checkbox"/>	
TARGET	Precision Intervention: High-level clinical protocols specific to your biology.	<input type="checkbox"/>	
SUSTAIN	Resilience & Healthspan: Long-term planning for a life without relapse.	<input type="checkbox"/>	

Section 3: Reflection & Alignment

The "Category of One" Commitment: *As an L4 Practitioner, I provide the clinical depth of a specialist with the partnership of a coach. To succeed, we must move from "guessing" to "knowing."*

On a scale of 1–10, how clear do you feel about the connection between your symptoms and the R.O.O.T.S. process?

Score: _ / 10

Observations & Breakthroughs: *(What is the one thing you've learned today that you haven't heard from other practitioners?)*

Next Steps:

1. Initial Objective: _____

2. Required Data/Labs: _____

3. Next Consultation Date: _____

AccrediPro Standards Institute Certified Tool Proprietary Framework: R.O.O.T.S. Method™