

Discovery Call Strategy & Enrollment Worksheet

Prospect Name: __ Date: __ Lead Source: __

Section 1: Pre-Call Mindset & Framing

Goal: Shift from "selling" to "serving." Set the stage in 3 minutes.

- ☐ **Mindset Check:** I am offering a solution to a problem costing them their quality of life.
- ☐ **Opening Script:** "My goal is to hear about your health, share how I work, and see if we're a good fit. If not, I'll point you to the right resource. Sound good?"
- ☐ **Rapport Built:** (Note one personal detail mentioned): _____

Section 2: The Deep Dive (Discovery)

Goal: Identify the "Breaking Point" and the "Cost of Inaction." (12 Minutes)

Discovery Question	Prospect's Response / Notes
The Breaking Point: What made you schedule this call today?	
The #1 Goal: What is the main thing you want to change?	
The Emotional Cost: How is this affecting your life/work/family?	
The Future Fear: What happens if this isn't fixed in 12 months?	

Section 3: The Gap & The Bridge

Goal: Connect their symptoms to your functional approach. (10 Minutes)

- **The "Why" (Clinical Hypothesis):** (e.g., Stress-response loop, mitochondria, gut-brain axis) _____
- **The Program Bridge:** (Which package fits their needs?) ☐ The 90-Day Transformation ☐ Custom Foundational Protocol ☐ Other: ____

- **Permission to Pitch:** "Would you like to hear how the program works and the investment?" ☐ Yes ☐ No/Not Yet

Section 4: Closing & Objection Handling

Goal: Confident pricing and addressing fears. (5 Minutes)

Price Presented: \$____ (Anchor: "One-time payment of \$X or 4 installments of \$Y")

Objections Raised: - ☐ **Money:** "What is it costing you *not* to fix this?" - ☐ **Spouse:** "What do you think their main concern will be?" - ☐ **Time/Fad Fear:** "This is the last money you'll spend on this because we address the *root*."

Outcome: - ☐ **Enrolled:** Deposit paid/Contract sent - ☐ **Follow-up Required:** Date: __
Time: __ - ☐ **Not a Fit:** Reason: _____

Section 5: Practitioner Post-Call Reflection

Call Score (1-10): __

What went well? _____ **Where did I hesitate?** _____

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