

Group Program Fit & Enrollment Worksheet

Practitioner Name: __ Date: __

Prospect Name: __ Program Name: ____

Section 1: Prospect Profiling (The "Linda" Audit)

Before the call, identify the prospect's current state to ensure they fit the cohort dynamic.

- **Primary Motivation:** (e.g., Brain fog, weight gain, exhaustion) _____
- **Past Experience:**
 - ☐ Has tried 1:1 coaching before
 - ☐ Feels isolated/lonely in their health journey
 - ☐ Struggles with solo consistency/accountability
- **Primary Hesitation (Predictive):**
 - ☐ Privacy/Sharing details
 - ☐ Fear of "watered down" content
 - ☐ Fear of falling behind

Section 2: The Curriculum Bridge

Identify 3 specific pain points and map them to your program weeks to demonstrate the "Power of the Cohort."

Prospect Pain Point	Program Week/Module	Specific "Lightbulb" Moment
<i>Example: Morning Fatigue</i>	<i>Week 2: Adrenals</i>	<i>Rebuilding daily rhythm together</i>
1.		
2.		
3.		

Section 3: Group Dynamics & Objection Handling

Check the boxes as you address these specific group-related concerns during the call.

- ☐ **Validation:** "You are exactly why I created this program. You aren't failing; you just haven't had the right container."
- ☐ **The Privacy Pivot:** Explained that lab results/personal data are private; sharing is optional.
- ☐ **The 1:1 vs. Group Value:** Highlighted 24/7 community support vs. waiting a week for a 1:1 call.
- ☐ **The Price Anchor:** Mentioned 1:1 investment (\$_) before stating Group Price (\$_).

Section 4: Fit Scoring & Reflection

Rate the prospect's suitability for a group environment (1 = Low, 5 = High).

1. **Coachability:** (Willing to follow the group roadmap) 1 2 3 4 5
2. **Community Value:** (Will they contribute/benefit from others?) 1 2 3 4 5
3. **Urgency:** (Ready to start by the cohort launch date?) 1 2 3 4 5

Total Fit Score: __ / 15 (*Score 10+ is a strong candidate for a group seat*)

Observations/Notes:

Next Steps:

- ☐ Invitation extended
- ☐ Deposit/Payment received
- ☐ Welcome Pack/Portal access sent
- ☐ Follow-up scheduled for: _____

AccrediPro Standards Institute Certified Tool Module 34: Group Programs & Workshops
