

Clinical Authority & Root-Cause Commitment Worksheet

Practitioner Name: __ *Prospective Client:* __ Date: __

Instructions: Use this worksheet during your high-ticket Discovery Call. Its purpose is to transition the prospect from "Symptom Awareness" (L1-L2) to "Root-Cause Commitment" (L4 Authority). By the end of this session, the prospect should view their health through the lens of physiological mechanisms rather than just a list of complaints.

Section 1: Symptom Awareness & History

Identify the "vague" symptoms that conventional medicine has failed to resolve.

- ☐ **Primary Complaint:** _____
- ☐ **Duration of Symptoms:** _____
- ☐ **Current "Quick Fixes" Attempted:** (e.g., supplements, OTC meds, generic diets)
- ☐ **Impact on Quality of Life:** (Work, Family, Energy)

Section 2: Moving to Clinical Mechanisms (The L4 Pivot)

Bridge the gap by explaining the underlying physiology. Check the boxes that apply to the client's case.

Clinical Focus Area	Potential Mechanism (The "Why")	Evidence/Markers to Explore
Metabolic	<input type="checkbox"/> Mitochondrial Dysfunction	Fasting Insulin, HbA1c
Hormonal	<input type="checkbox"/> HPA Axis / Cortisol Rhythm	Diurnal Cortisol, DHEA-S
Gut-Health	<input type="checkbox"/> Intestinal Permeability	Zonulin, Inflammatory Cytokines
Immune	<input type="checkbox"/> Autoimmune Triggering	Antibody Titer, CRP

Practitioner Notes on Mechanism: *Instead of "fixing fatigue," explain how we address the "Neuro-Endocrine link" or "Inflammatory Cytokine Modulation."*

Section 3: The R.O.O.T.S. Method™ Readiness Score

Assess the prospect's readiness to move from a "session-to-session" mindset to a "Clinical Outcomes Program."

Rate the following on a scale of 1-5 (1 = Low, 5 = High): 1. **Understanding:** Does the client grasp that symptoms are systemic? _ 2. **Commitment:** *Is the client ready for a 3–6 month functional resolution?* _ 3. **Financial Priority:** Is the client ready to invest in a high-ticket protocol? _____

Total Readiness Score: __ / 15 (*Score of 12+ indicates a high-fit candidate for an L4 High-Ticket Program*)

Next Steps & Clinical Plan:

- ☐ **Recommended Program:** _____
- ☐ **Initial Lab Panels Required:** _____
- ☐ **Follow-up / Enrollment Date:** _____

Practitioner Reflection: *Did I use clinical language (e.g., "Functional Resolution") instead of coaching language?*

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