

# Discovery Call Workflow & Compliance Checklist

Prospect Name: \_\_\_\_\_ Date: \_\_\_\_\_ Goal Outcome: \_\_\_\_\_

## Section 1: Rapport & Framing (0–5 Mins)

*Establish authority and set the agenda immediately.*

- [ ] **Connection:** Shared a brief, genuine greeting (e.g., "I've been looking forward to this").
- [ ] **The "Permission" Frame:** Used the script: *"My goal is to hear your journey, see if we're a fit, and if so, explain how we work together. If not, I'll point you to a better resource. Sound good?"*
- [ ] **Prospect Response:** \_\_\_\_\_

## Section 2: The Deep Dive (5–15 Mins)

*Identify the "Gap" between their current state and their desired future.*

Discovery Question	Prospect's Answer / Key Pain Points
<b>The #1 Struggle:</b> "What is the main thing holding you back right now?"	
<b>The Impact:</b> "How is [symptom] affecting your work/family/life?"	
<b>The Cost of Inaction:</b> "If we don't address this now, where are you in 12 months?"	
<b>The Goal:</b> "What does 'optimal health' look like for you specifically?"	

## Section 3: The Functional Bridge & Compliance (15–20 Mins)

*Pivot from "curing disease" to "optimizing function."*

- [ ] **The Pivot:** Used compliant language (e.g., "We don't look for disease; we look for optimal function").

- [ ] **The "Why":** Mentioned investigating underlying factors (e.g., HPA-axis, mitochondrial support, gut-brain axis).
- [ ] **Check for Understanding:** Asked, "Does that approach make sense to you?"

**Compliance Check:** - [ ] Avoided words: *Cure, Treat, Diagnose, Prescription.* - [ ] Used words: *Support, Optimize, Balance, Bio-individual, Function.*

## Section 4: The Offer & Objection Handling (20–30 Mins)

*Present the package with confidence.*

**Program Name:** \_\_\_\_\_ **Investment:** \$ \_\_\_\_\_ - [ ] **The Pitch:** Stated the price clearly and practiced **The Power of Silence** (stopped talking for at least 5 seconds).

**Objection Tracker:** - [ ] **Time/Spouse:** "What do you think their main concern will be?" - [ ]

**Money/ROI:** "How do you value getting answers compared to staying on this path?" - [ ]

**Commitment:** Explained why a 3–4 month "container" is required for physiological change.

## Section 5: Post-Call Reflection

**Call Outcome:**  Enrolled  Follow-up Scheduled  Not a Fit

**Self-Assessment (1-5):** 1. **Rapport:** Did the client feel "heard"? \_ 2. **Compliance: Did I stay within my scope of practice?** \_ 3. **Confidence:** Did I state the price without "imposter syndrome" energy? \_\_\_\_\_

**Practitioner Notes for Next Steps:**

---



---

AccrediPro Standards Institute Certified Tool