

Discovery Call Strategy & Enrollment Worksheet

Prospect Name: __ Date: __ Referral Source: __

Section 1: Phase 1 – Rapport & Permission (0-5 Minutes)

Goal: Establish authority and identify the immediate catalyst for change.

- [] **The "Why Now" Question:** "What was the specific moment this week where you said, 'I can't keep living like this'?"
 - Notes: _____
- [] **Permission to Lead:** "My goal is to see if I'm the right person to help and show you a path back to yourself. Does that sound like a good use of our time?"
 - Response: Yes No/Hesitant

Section 2: Phase 2 – Defining the "Gap" (5-15 Minutes)

Goal: Uncover the emotional and physical distance between their current state and their goals.

Metric	Current State (1-10)	Desired State (1-10)	The Emotional "Cost"
Energy Levels			
Brain Fog/Focus			
Confidence/Body			

- **The Future Projection:** "If we don't address the root cause, where do you see your health/career in 12 months?"

 - _____
- **The "First Thing" Goal:** "If you woke up with your 10-years-ago energy tomorrow, what is the first thing you'd do?"

 - _____

Section 3: Phase 3 – The Functional Bridge (15-25 Minutes)

Goal: Move from "Normal Labs" to "Functional Systems."

- **The Root Cause Explanation:** (Check which systems to highlight based on symptoms)
 - [] HPA Axis (Stress Response/Fatigue)
 - [] Metabolic Flexibility (Weight/Energy)
 - [] Gut-Brain Axis (Brain Fog/Mood)
- **Proposed Program:** _____

Section 4: Closing & Objection Handling

Goal: Present pricing with confidence and resolve fears.

- **Pricing Presented:**
 - [] Full Investment: \$1,800
 - [] Monthly Plan: \$650/mo
- **Objection Encountered:**
 - [] Spouse/Partner [] Finances [] Time/Commitment [] Skepticism ("Will it work?")
- **The "Fear Probe" Response:** "Is it the cost, or is it the worry of trying another thing that might not work?"
 - **Notes:** _____

Section 5: Post-Call Reflection

Enrollment Status: Enrolled (Deposit Paid) Follow-up Required Not a Fit

Practitioner Self-Assessment: 1. Did I state the price as a fixed fact without "uptalk"? Yes
 No 2. Did I spend enough time in Phase 2 (The Gap)? Yes No 3. What was the prospect's primary "Emotional Hook"? _____

Next Steps: - [] Send Welcome Packet / Contract - [] Schedule Follow-up Call (Date: ____) -
[] Send "Thank You" or Resource Email

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