

Discovery Call Mastery Worksheet

Prospect Name: _____ Date: _____

Primary Health Goal: _____

Phase 1: Rapport & Framing (0–5 Minutes)

Goal: Establish authority and set expectations.

- [] **Rapport Building:** Mention a detail from their intake form (e.g., location, weather).
- [] **The "Fairness" Frame:** "My goal is to understand what's going on. If I can help, I'll explain how. If not, I'll point you to someone who can. Does that sound fair?"
- [] **Permission to Lead:** "Is it okay if I ask you some specific questions about your history?"

Phase 2: The Deep Dive (5–20 Minutes)

Goal: Identify the "What" and "Why," but NOT the "How."

Key Question Area	Prospect Response/Notes
The Symptom: "Describe the [Brain Fog/Fatigue]—how does it feel at its worst?"	
The Impact: "How is this affecting your work or relationships right now?"	
The 'Why Now': "Why is it critical to fix this today versus six months ago?"	
The Gap: "What have you tried that failed? (e.g., \$2k on supplements/PCP labs)"	

The 3-Second Rule: After they finish a difficult story, wait 3 seconds before responding.

Notes on their emotional state: _____

Phase 3: Pricing & Objection Handling (20–30 Minutes)

Goal: Present the program and use the "Drop and Stop" method.

The Offer: 90-Day Root Cause Restoration (\$2,400 or 3x \$850) - [] **The Pitch:** "Based on what you've shared, I'm confident I can help you regain your edge." - [] **The Drop and Stop:** State the price and remain SILENT until they speak.

Objection Checklist (Empathy-Evidence Framework): * **"Too Expensive":** Ask: "What is the cost of NOT fixing this over the next 12 months?" * **"Talk to Spouse":** Ask: "When you talk to them, what do you think their main concern will be?" * **"Tried Everything":** Explain: "We use functional data (testing) so we stop guessing."

Section 4: Post-Call Reflection

Call Outcome: - [] Enrolled (Deposit Taken) - [] Follow-up Scheduled (Date: ____) - [] Not a Fit / Referred Out

Self-Assessment (1-5 Scale): 1. Did I maintain authority/framing? _ 2. ***Did I avoid giving free advice (the How)?*** _ 3. Did I stay silent after stating the price? ____

Practitioner Observations:

Next Steps:

- [] Send Welcome Packet / Contract
- [] Send "Thank You" or Referral email
- [] Update Income Projection Spreadsheet

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