

High-Value Discovery Call Protocol Worksheet

Prospect Name: __ Date: __ Target Program: ____

Section 1: Phase 1 & 2 - Framing & The Deep Dive

Goal: Set the agenda and identify the emotional "Why."

The Opening (Checklist): - ☐ Stated 30-minute timeframe - ☐ Explained the goal:
(Understand health -> Share approach -> Determine fit) - ☐ Gained permission to lead:
"Does that sound good?"

The Diagnostic Interview: - The Vision: If we were sitting here a year from now, what does
"feeling like yourself" look like?

- **The Gap:** Why is fixing this a priority *now*? What have you already tried?

- **The Cost of Inaction:** What happens if you stay on this path for another 6 months?

- ☐ **The Golden Silence:** Did I wait 3 seconds after their answer to allow for deeper sharing?

Section 2: Phase 3 & 4 - The Prescription & Invitation

Goal: Bridge the gap between their pain and your solution.

Phase	Component	Practitioner Notes
Prescription	Connect the dots: Link their symptoms (e.g., brain fog) to your methodology (e.g., gut-brain axis).	
Invitation	State the program: "I'd love to invite you to the [Program Name]."	
Investment	State the price: "The investment is \$[Amount]." (No apologizing/wavering).	

Section 3: Objection Handling & Outcome

Goal: Address uncertainty with high-authority/low-pressure language.

Objection Encountered (if any): - ☐ Money/Investment ("Too expensive") - ☐ Partner/Spouse ("Need to talk to husband") - ☐ Time/Capacity ("Too busy right now") - ☐ Certainty ("Will this work for me?")

Reframing Response Used: _____

Final Call Outcome: - ☐ **Enrolled:** Deposit taken / Contract sent - ☐ **Follow-up:** Scheduled for (Date/Time): ____ - ☐ **Not a Fit: Referred to:** ____

Section 4: Practitioner Post-Call Reflection

Self-Audit (1-5 scale): 1. My level of confidence stating the price: ____ **2. My ratio of listening vs. talking (Goal: 70/30):** ____ 3. Clarity in connecting their "Why" to my program: ____

Key Takeaway for next call:

AccrediPro Standards Institute Certified Tool

Instructions for Use:

1. **Pre-Call:** Review the Prospect Profile (e.g., "Diane") and note their primary pain points in Section 1.
 2. **During Call:** Use the checklist in Section 1 to ensure you don't "wing it." Use the "Diagnostic Interview" space to write down their exact words—use these words back to them during the Prescription phase.
 3. **The Close:** When you state the price, stop talking. Wait for their response.
 4. **Post-Call:** Complete the Reflection section immediately while the energy of the call is fresh to improve your conversion rate over time.
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