

# 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.

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## 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)
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## 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           | [ ] Mitochondrial Dysfunction   | Fasting Insulin, HbA1c          |
| Hormonal            | [ ] HPA Axis / Cortisol Rhythm  | Diurnal Cortisol, DHEA-S        |
| Gut-Health          | [ ] Intestinal Permeability     | Zonulin, Inflammatory Cytokines |
| Immune              | [ ] 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."

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### 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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