

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
The #1 Struggle: "What is the main thing holding you back right now?"	
The Impact: "How is [symptom] affecting your work/family/life?"	
The Cost of Inaction: "If we don't address this now, where are you in 12 months?"	
The Goal: "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:

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