

R.O.O.T.S. Method™: My Health Transformation Roadmap

Client Name: _____ Date: ____ Current Membership Tier: [] Foundation [] Transformation
[] Maintenance (Sustain)

Section 1: Phase Identification & Goal Alignment

Identify where you are in the R.O.O.T.S. Method™ to ensure your program resources are being utilized effectively.

Current Phase (Check one): - [] **REVEAL/ORGANIZE:** Initial lab testing and history taking.
- [] **OPTIMIZE:** Focusing on the "Big 5" (Sleep, Hydration, Nutrition, Movement, Stress). - []
TARGET: Specific clinical protocols (e.g., Gut Health, HPA Axis, Detox). - [] **SUSTAIN:** Long-term healthspan maintenance and community support.

Top 3 Health Goals for this Phase: 1. _____ 2. _____ 3. _____

Section 2: The "Flipped Classroom" & Protocol Tracker

Our practice uses an 80/20 model. We provide the 80% (Foundational Education) via your digital portal so our 1:1 or Group time can focus on the 20% (Your Unique Bio-Individuality).

Requirement	Action / Video Module Completed	Key Takeaway / Question for Practitioner
Education	[]	
Education	[]	
Standard Protocol	[]	
Individualized Variable	[]	

The 80/20 Check-In: - **The 80% (Foundational Habits):** On a scale of 1-10, how consistent are you with the digital module recommendations? __ - **The 20% (Clinical Detective Work):** List one specific symptom or reaction that feels unique to your body this week:

Section 3: Readiness for the "Sustain" Phase

As you move from the "Target" phase to "Sustain," we shift from practitioner-led care to community-supported health.

Self-Assessment Checklist: - [] I understand my primary triggers and how to manage them. - [] I have completed my core "Target" protocol (e.g., 5-R Gut Framework). - [] I feel confident navigating my foundational nutrition without daily guidance. - [] I am ready to engage with the peer community for long-term accountability.

Total Checkmarks: ___ / 4 (3+ checkmarks indicates readiness to transition to the lower-cost Maintenance/Sustain Membership Tier).

Section 4: Reflection & Next Steps

What is the biggest win you've experienced in your current phase?

What is one barrier we need to address in our next Group Office Hours or 1:1?

Next Steps: - [] Watch Module: _____ - [] Register for next Community Masterclass on (Date): _____ - [] Adjust Supplement Protocol per Clinical Playbook.

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