

Jennifer Spencer & Steve Fernandez | Pause + Expand

Discovery Call Prep

Potential Goal

"Helping you systematize what's currently a people-intensive, relationship-driven business so you can scale without losing the human touch."

Key Reminders & Pain Points

Dual Business Complexity

- Jennifer runs **two parallel operations**: Pause + Expand (corporate/membership) AND personal medium/retreat business
- Likely needs separate funnels, unified CRM, cross-promotion workflows

Membership Operations (\$39/month)

- 3 live sessions weekly (Mon/Tue/Wed 8:30am EST)
- Recording library management
- Private Facebook group for community
- Needs: automated onboarding, reminders, churn prevention, engagement tracking

Corporate Sales Pipeline

- Big clients: Adobe, Uber, CVS, Cigna, Wattpad, Government of Canada
- Long enterprise sales cycles, custom programs
- 20-min discovery calls mentioned
- Needs: lead nurturing, proposal automation, follow-ups, client onboarding

Retreat/Event Management

- Sedona retreat Jan 29-Feb 1 (limited spots)
- Jennifer's 1:1 readings often sold out
- Needs: waitlist automation, pre-event sequences, payment reminders, testimonial collection

Tech Stack Gaps

- WordPress + Elementor website
 - Basic contact form (no Calendly-style booking visible)
 - Linktree for links, Facebook group for community
 - Systems likely disconnected - manual work bridging them
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Discovery Questions

Current State

1. Walk me through what happens when a new corporate lead contacts you - from inquiry to signed contract.
2. How do you currently manage membership onboarding, payments, and communications?
3. Jennifer, how do you handle logistics for personal services (readings, retreats) separate from Pause + Expand?

4. What's your biggest time sink that feels like it should be automated?

Pain Points

- 5. For a 12-week corporate program, how do you track client progress and communicate with them?
- 6. How do you handle waitlists for sold-out offerings?
- 7. What happens after someone fills out your contact form? What's the follow-up process?
- 8. Are your systems (CRM, email, scheduling, payments) connected, or is there manual work bridging them?

Growth Blockers

- 9. If you could fix one operational headache, what would it be?
- 10. You've landed impressive clients like Adobe and Uber - what's preventing you from scaling that success?
- 11. How much time do you spend on admin vs. actually delivering services?

Qualification

- 12. What made you reach out now? Was there a specific trigger?
- 13. Have you tried other solutions or worked with someone on systems before?
- 14. What does success look like 6 months from now?

Quick Reference

| Person | Background |
|------------------|--|
| Jennifer Spencer | Former VP Marketing (Body Shop, Holt Renfrew, Wattpad). Sound healer, medium. 119K IG followers. |
| Steve Fernandez | Masters in Psychology (McMaster) + MBA (Schulich). Former Sony Music marketing. Leads Monday sessions. |

Founded: March 2020 (pandemic response) **Core Differentiator:** Live experiences over apps - human connection focus