Hey Chick,

Here is your guide to having an effective discovery call with a potential client. This will help you determine what their needs are as well as how you can best serve them.

The Discovery Call is designed to be a complimentary call approximately 30 minutes in length.

These are some of the questions you can ask during the complimentary consultation that you will find very effective for getting the information you need to support your clients.

Once the client decides to proceed with coaching, you then can schedule their first session where you go through their health history and get more detailed information about them. (Send the client the agreement, payment instructions and health history once they schedule their first session and first session only begins once payment and agreement are received).

This initial discovery call is designed to get some basic information and let your prospective client know how you may be able to help them. It’s also a good time to determine if they are a good fit for YOU which is just as important.

Simply copy and paste the questions into a Word document and edit them to reflect your own brand, personality and approach.

**Name: Date:**

**Referred By:**

*Welcome your prospective client to the call and let them know you’re looking forward to*

*learning more about them.*

**<Name>, I am so excited that you have reached out and are wanting to learn more about how you can make healthy life changes.**

**Was there anything recently that has happened in your life that has made you interested in getting healthy?**

**\*\*If they have recently had a transformation of their own please ask them to share their why\*\***

**What is your biggest health concern or challenge right now?**

**Are you under the care of a doctor right now for any medical condition or taking any prescription medications?** *(This is where you can get an idea if they may or may not be a good fit for you depending on their answer and your scope of practice.)*

**What are the top 3 things you would like help with?**

**Why is that important to you?**

\*\*This is where you need to dig deeper. The why usually starts with weight loss, or wanting to feel better in their skin which is great but dive deeper.

Continue to ask why, example:

You want to lose weight for upcoming event, why?

So I feel comfortable in skin.

Why?

Because I am presenting at the event and don’t want to be judged.

Why, did you struggle with this in past?

Yes, I was bullied about my weight in my teens and now want to show up and show off where I am at.

So now you know that this stems from self-confidence and past behaviors so you can watch those past behaviors as well as teach your client to stop the “tape” from playing over and over when they are turning back to past behavior and end cycle.

**What would make you feel like you have been successful big picture?**

**What smaller milestones would help you to continue to feel momentum and success?**

**What have you tried in the past? Please share the good, bad and ugly.**

**How did that go?** *or* **What did you think of that?**

**Support and accountability are very important aspects to making a lifestyle change. Do you feel as though you have the support around you (family, friends, co-workers, coach) to make these changes?**

**What area do you feel you need the most support in?**

**What are 2 or 3 things you know you could be doing for your health that you are not currently doing?** *(Acknowledge that those strategies are a good place to start, if applicable.)*

**Is there anything else you’d like to share with me?** *(Hear what they have to say then lead into how you can help.) This is also where you acknowledge that your expertise is what they are looking for as well as reiterate what they have said so you know you are both on a clear path towards success.*

***For example:*** *I can completely relate to everything you’ve shared and I’ve experienced some of the same challenges myself – so I understand. These are some of the most common areas where I help my clients. It sounds like your biggest challenges are \_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_ and that’s important to you because \_\_\_\_\_\_\_\_\_\_\_. Is that right?*

**Are you at the point where you really want to make positive changes and are ready**

**to take action?**

**Would you like to hear how my coaching program can help you reach your goals and ultimate success with your health?**

**Great! This is now where you explain exactly how your program will work and benefit them.**

**For example:**

We will meet 2 x per week in person and have a weekly virtual check in to see how you are feeling, what type of progress you are making and to discuss tweaks to your program to ultimately help you to continue to move forward and progress. There will also be a weekly meal plan and workout guide given to you every Sunday to set you up for success outside of our in person meetings.

**How does that sound to you?**

*Explain what’s included (healthy recipes and anything else you offer – email support, etc.) and the program price and duration.*

**My program fee is $\_\_\_\_\_ per month and most clients work with me for \_\_\_\_ months to make lasting changes and maximize results.**

**This is where you can also offer payment plan if that is an option as well as bundle programs and payment options.**

**How does that sound to you?**

**Do you have any other questions for me?**

**I am so happy we had the opportunity to speak today and that you are at a place where you know changes are needed in order for you to feel your best, and I’m confident I can help you. Is this something you would like to get started with?** *(If yes, explain the steps to getting started.)*