

TRANSFORMATIONAL  
EMBODIMENT COACHING  
*Certification*

DISCOVERY  
*Call Guide*

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## DISCOVERY CALL GUIDE

The most common way to enroll new coaching clients is through a 'clarity' or 'discovery' call.

**THIS IS NOT A FREE COACHING SESSION.**

A clarity or discovery call is a chance for you to meet with a potential new client and see if:

- 1. They are coachable.**
- 2. They are a good fit for your coaching.**

The format of a clarity or discovery call is similar to a coaching session, but not the same.

The following guide will help you to ensure that you are following the necessary steps that prospective clients need to experience in order to have everything they need to base their buying decision on.

## Step One

### CONNECT

More than 50% of why people buy has nothing to do with what you are selling.

It has everything to do with how they FEEL during the conversation.

Coaching works in partnership. If you don't connect with your client, or they do not connect with you, coaching is either not going to work, or it will not be as effective as it could be.

Connect on your prospect's initial objection first – this is their false belief about themselves.

**FOR EXAMPLE:** “It won't work for me”, “I am not worth it”, “I can't afford it” etc so connect with that first.

## Step Two

### PAIN

People reach out to you because they need your help. People's pain is usually worse than they believe it is.

**FOR EXAMPLE,** the impact of not being successful in business is not just financial, it has a much further reaching impact on freedom, relationships and even health.

Use the question prompts provided in the following pages to help your prospective client really see the impact of the pain they are experiencing. Your prospect's pain will be indicative of their objections.

**FOR EXAMPLE,** if they are struggling in business, they will likely have financial objections.

You can address these before they object by being open and honest about the need for investment to remove the pain.

**ANOTHER EXAMPLE** might be if your prospect wants to lose weight but hasn't been able to in the past.

Their objection will be about it not working for them, because nothing else has in the past. You may address this by recognising that they haven't given up because they have reached out for help from you.

## Step Three

### TELL THEM THE TRUTH

Tell them the truth about what will or won't happen if they continue to do things this way. This is **NOT** about agitating the pain that your prospect is experiencing (*which I have seen taught in many places*).

**REMEMBER THE DISCOMFORT OF STAYING WHERE THEY ARE  
MUST OUTWEIGH THE DISCOMFORT OF CHANGING**

This is about being absolutely honest about the long term and farreaching impact of continuing down the same path that your prospect is currently on.

**If they didn't want change, they would not be on the call with you.**

Regardless of the outcome of the call and whether or not you go on to work together, this is the biggest gift you can give your prospect on the call.

It is worth remembering that as coaches, it is great to be a cheerleader but that is not always what our clients need. In this portion of the Discovery Call, you are giving your prospect what they need.

## Step Four

### WHAT DO THEY WANT?

Next, tell them the truth about where they could be. Most people don't realise their significance or what is actually possible for them. This is often the hardest part, **practice it in advance**.

This is where you help your prospective client see the possibilities that are open to them. What life could look like without the pain.

Just as you helped them to explore the far-reaching impact of the pain, you can also help them to see the wide reach of the vision in every area of their life.

This is not about daydreaming though, it is always grounded in the truth of what's possible. The more experience you have, and the more clients you help, the more confident you will become in this step because you know it to be true.

**WRITE DOWN THE WORDS THAT THEY USE.**

They are not looking for coaching; they want **freedom, love, health, a future to look forward to** etc. These are the words you will reflect back to them. Just as you would in a coaching session.

## Step Five

### MAKE THE INVITATION

This is not about reeling off your process.

It is about summarising and paraphrasing what the prospect wants (VISION) and why (PAIN) and then tell them you can help them.

They will feel relief that you can help them and want to know more about how to solve their pain.

Up until this point you have been 'diagnosing' what their pain is in **relation to their vision**. At this point, you begin to 'prescribe' the solution.

Make your recommendation based on how you can serve them BEST.

We want to move our clients out of pain and into their vision as quickly as possible so offer them your best package for this. If they object, then you can offer a lesser package, but just as a doctor or a tradesman will recommend a course of action, you make it clear that your recommendation is your best offer.

If they choose a lesser offer that is fine, but make sure they know that they can get a result quicker with your other package.

## Step Five B

### PRICE

Before you even get to the price, ask your prospect to tell you what is most appealing about each of your recommendations.

When your prospect has self-selected based on your recommendations, they will ask for the price, or you may have to tell them the price.

This is where many coaches begin to get nervous.

Tell them your price and then be quiet!

The silence can be uncomfortable, but the prospect is not trying to determine *your* value, they are trying to determine *theirs*!

## Step Five C

### CLOSE

The easiest way to move your client forward is to get their first payment while you are on the call.

The reason for this is that our primal instinct will always talk us out of change.

If you cannot get them to commit to starting working with you on the call, then make a follow up appointment there and then.

Book another time to follow up and answer their questions and queries.

Sometimes it takes a couple of meetings to build enough trust between you, and enough self-belief in the client.

## Step Six

### TELL THEM WHAT WILL HAPPEN NEXT

The best way to ensure that your new client feels confident in their decision to work with you is to lay out what will happen next, and give them something to do straightaway.

**FOR EXAMPLE**, you could tell them that you will be following up with an email with your standard client agreement.

Explain that it is a simple agreement that outlines what you expect from your client, and what they can expect from you.

Then, as soon as they have signed and returned the agreement, they will receive their Client Pack and booking link for their first call.

Remind them that they need to have time to complete the pack in advance of the first call.

Also, tell them where they can go for help. This might be your best email, or perhaps your VA if you have one.

Remember, your new client is vulnerable at this point, and it is up to you to step up and make them feel safe by showing them what is going to happen.

**AND THAT'S PRETTY MUCH IT.**

# EXAMPLE DISCOVERY CALL

THIS IS PROVIDED AS AN EXAMPLE ONLY,  
AND NOT INTENDED TO BE USED AS A SCRIPT.  
USE YOUR JUDGEMENT.

## STEP ONE: CONNECT

Hi [firstname] - it's nice to meet you.

Whereabouts are you speaking to me from? [build rapport]

## STEP TWO: PAIN

**After a couple of minutes of bonding move onto...**

So, tell me, what are we discussing today?

What are your biggest challenges around that?

What is the impact that those challenges are having on your life, work, business, family, friendships, health currently?

What have you tried so far?

Why do you think it hasn't worked?

## STEP THREE: TELL THEM THE TRUTH

What will happen if you don't change this?  
What else?

So the truth is that if you don't change what is currently going on you will [insert their responses]?

**REMEMBER THE DISCOMFORT OF STAYING WHERE THEY ARE  
MUST OUTWEIGH THE DISCOMFORT OF ENROLLING.**

## STEP FOUR: WHAT DO THEY WANT?

What's the dream outcome?

Where are you?

Where are you going?

Who are you with?

What's different to now?

And how is that impacting your family, friendships, health, etc?

**[use their words from the pain segment]**

## STEP FIVE: MAKE THE INVITATION

Ok, so so currently you are **[insert pain]** and we agreed that if things were to continue as they are that the far-reaching impact of that is **[the truth of staying where they are]**, and you would like things to be **[insert vision]**?

**[Prospect agrees]**

Well, I can help you with that. There are a number of ways I can help you, would you like to hear about them?

**[Prospect agrees]**

## STEP FIVE B: PRICE

Given what you have shared with me, and the challenges you have, I would recommend that we work together **[in this way - explain your best offer succinctly]**.

How does that sound? **[if client is happy move onto price and close]** **[If client is unsure then...]**

Or, if that sounds a bit too intense right now, we could do this **[insert downsell package]**, although it will likely take longer to reach **[vision]**.

How does that sound?

Great, the price for that package is **\$XXX**, and we can get started straightaway with a payment of **\$XX**.



## STEP FIVE C: CLOSE

Would you like me to go ahead and get you in the system?

**[Take payment on the call or book another follow up call in 24-48hrs time]**

## STEP SIX: TELL THEM WHAT WILL HAPPEN NEXT

Great!

That's all gone through fine.

What you can expect next is an email from my assistant, Nicola.

In that email will be a simple agreement for you to sign and return. It basically outlines what I expect from my clients, and what you can expect from me.

If you have any questions about it, just reach out to either Nicola or myself and we'll be happy to answer them for you.

Once we have that agreement, then you will get a follow up email with some homework to complete in advance of our first session, and a booking link to my schedule to book that call.

Do you have any questions at this stage?

**[Answer questions]**

I'm really looking forward to getting started on **[vision]** with you **[firstname]** and I want to acknowledge you for taking the next step with me.

## SUMMARY

A Discovery Call is not a free coaching session, however there are similarities.

Your role in the Discovery Call is to “**Diagnose**” the prospect’s challenge, and “**Prescribe**” the BEST course of action that you can.

During the Discovery Call you are also assessing whether the prospect is **coachable**. This means that they demonstrate working in partnership with you on the call by being open and answering your questions honestly and vulnerably.

You are also assessing whether the prospect is a good fit for *your* coaching offers. If they are not, do not fear referring them to a coaching colleague. This means a better result for the client and a better result for you.

**REMEMBER YOUR REPUTATION IS BUILT ON YOUR RESULTS, AND YOUR BEST RESULTS COME FROM THE BEST FIT CLIENTS.**

Assuming all goes well, and your prospect accepts your invitation to work together, make sure that they know what will happen next and give them something to do immediately to reduce any buyer’s remorse.

And finally, use this guide as exactly that – a guide. Trust your intuition and be present during the call.