

Part 1.

The Consult Crossroads. Will you hire them or not? Identifying a potential client begins with the client consultation. This is necessary in order to make certain that the relationship is right for both you and the client. You are the business owner. Your own needs must set the priorities and even when you're starting out or you're needing business, you should turn down any client who will require exhausting hours, extraordinary hassles, or undue stress. So starting with the consult, we are actually starting with a structure. We're creating the structure of the interview so that we have control and can guide it to both complete it in the time allowed and to get the information that we need in order to decide if we will hire this client. I always start with a two-minute overview. Immediately as I get on the phone, we both exchange hellos and, you know, glad to be meeting with you today. And I move right into my two-minute overview. What I'm explaining to them in this overview is a couple different things. I am setting up the base structure for why and why not we are meeting. So the first thing that I explain to them is that this consult is not a sales call and there is a no sales approach to the discussion that we're having. I tell them that it must be this way because I am not seeking to convince or to sell anyone on the idea of working with me. It must be completely their choice. It must resonate with them. They must hear what I'm telling them and be able to make the choice of working with me on these consults. My job is to advocate for anyone seeking out a path to healing. And if I feel that a different approach will serve them better, I use my integrity and I recommend other options. The third thing that I tell them, and this is the most critical for setting up the rest of the structure, is that I do meet with people whose cases require more time than I can properly devote, and that's not fair to the client if I take on these cases knowing that I don't have enough time to devote to their case. Now we're going to see where my reasoning comes into play for why I use this two-minute overview. After the overview, we move right into the 10-minute discussion. This is where I allow them 10 minutes to discuss their health concerns. And I do specifically say this to them. I say, let's spend the next 10 minutes discussing your health concerns. I want you to openly share with me what you're experiencing and where you feel you're at in your health journey. Now, I also let them know that if they say something that raises a question, I will interrupt them to ask a clarifying question along the way. After they finish discussing their health concerns and giving me their list of symptoms and some of the timeline information, I then turn over to the form review and I say to them, let's spend a few minutes reviewing the form that you completed when you signed up for your consult. You may have reviewed this information before you even got on the consultation, but it's best to review these questions with the client to hear them speak and be very specific about what they mean when they answered some of the questions. So looking at the form, Are We a Good Fit Together?, you're asking them, What are your top two health challenges, together. You're asking them what are your top two health challenges, which they've just answered you in the 10 minutes that you provided to them. You're asking them next, what type of benefit do you expect to get while working on these health issues? And that's important to know, because that gives you a reference to the frame of mind of the person. and everything to be healed, well, we know that that is an unreasonable expectation and we would want to be aware of that before we sign this person up as a client.

The next question is,

what has prevented you from reaching your health goals? We definitely want to understand this because they may throw different challenges into the conversation saying, well, I just didn't have enough money to purchase the right food or, you know, I worked with these practitioners and they just were not smart enough to help me. Everything that they are telling you is telling you about their ability to be a good client. That's what we need to know.

There is another question on here

about how many doctors or practitioners have you worked with to achieve your health goals over the last two years? And they may have a large amount of practitioners listed. They might say, I've worked with 10 different practitioners. That is also a red flag. And you really need to take a moment just to investigate this and ask them. So you've worked with 10 practitioners. What do you think was not addressed while working with these practitioners? You must understand where the client themselves feels like there was a failure point. And you need to explore that with questions. Another question is, are you financially able to do what's necessary to reclaim your health? This is absolutely critical. They must have enough finances to be able to hire you as a practitioner, practitioner to make diet and lifestyle modifications such as potentially purchasing cleaner food and not so much refined food, or purchasing supplements or functional lab testing that you may require in order to understand their case better. If there is an issue in purchasing any or all of these things, this could also present an issue with you understanding their case and working with them as a client. You know, one thing I've said throughout all the modules is we do not have a crystal ball. We do have certain tools in place in order to understand the client case and to help guide them. And without these tools, we're walking blind. We can't help them in the way that we should or that we want to. So as a recap, pay attention to anything that you feel is a red flag on this form, are we a good fit to work together, and have them answer questions that you feel are pertinent. Again, have they worked with many practitioners and had no improvement? When they speak to you, do they tear down their past practitioner's ability to help them? Do they seem to have a victim mentality that nothing will ever work to help them? Keep this in mind as you continue through your consultation. The next thing is, you must understand the motivation of your client. And in order to do that, you must ask them, what motivates you to want to heal your body? You know, are they trying to, again, heal in just a very short time? Or are they ready to commit for the end results, even if that takes a few months? At the next stage, this is where I ask them, would you like to hear how I work? I allow them to answer and then I immediately start discussing my principles. The principles of how you work are extremely important to express to the client because they start getting an understanding for who you are, your integrity, and your expectations. I tell them three specific things. The body has a healing capability and together we seek to discover what tools are needed to enhance that capability. The body having its own healing capability is the major concept of functional medicine. If they are not in alignment with that, then working with you is not going to benefit them. The second thing that I tell them is, I am not a healer, I am a teacher, but I am

guiding you and teaching you to discover what your unique body may need in order to heal. This is setting the stage for clarifying with this potential client of your role and the fact that you are not acting in the role of the healer, you are not healing them, you are working side by side with them to guide and teach them to find these discoveries that they will make themselves. The third thing that I tell them is this method is different than any approach you may have tried before because our focus is on you and the clues that we can discover that promote healing since healing is different for each person. Once I've outlined my principles I outline a picture of what it looks like to work together. So I tell them the things that you're doing to support your health do not appear to be helping you which is why we are here visiting today. That's a fair statement to make to this potential client. Our goal together is to find those unique things that are the right support for your own body. Now an example of that would be, you may be eating very clean, but you're not feeling any improvement from that. You won't get the benefits of eating cleanly if you're not digesting and absorbing nutrients from that food. So understanding how well you are digesting and absorbing is a part of the process that we are definitely going to explore. The next thing that I tell them in the outline of this picture of working together is, you cannot heal in the same environment in which you became ill. And I ask them, what does that mean to you? Do you feel that way? Do you understand what that means. The next thing that we look at is what does it really take to move into an environment of healing. Okay, so first we have to recognize what must be removed, replaced, and rebalanced. We do this through investigative work. I tell them your body has the answers and the clues to healing, and we work together to discover those things. We can learn through insights and lab work where and how to best support the needs of the whole body. I do outline the foundations of health for them that must be in place to create the conditions for change. And again, we can go back to the foundations of health chart and see hydration, nutrients efficiency, digestion and absorption, elimination, sleep, and our work is to get these established first to better understand what else the body requires to find balance. That is how I explain the foundation of health chart to them. Although I am not sharing the chart with them, I am discussing just the topics on the chart. I next ask permission of them to discuss what I charge and what's included. When I discuss what I charge, I am very upfront with that pricing and I explain to them I charge this amount and this amount includes two specific things. It includes the amount of sessions, and in my case that is three sessions, and it includes research time. I do explain to them that what you don't see are the hours of research done for your case or all the time that I spend reviewing and analyzing your lab work and intake data as we progress through your case. These hours are also included in the price. The next section that I go on to after discussing price and what is included is what I expect when working with a client. Now it's not fair to ask somebody to work with you and you're not telling them what you expect of them. They need to know that. So, I'm very specific about detailing the client's part of the work, meaning that I am going to ask you to be monitoring changes and potentially journaling on a daily basis to collect changes and things that might be happening to you along the way. I explain to them that I cannot guarantee the length of time that healing will take as everyone heals differently. I explain that I expect them to communicate new information to me and potentially journal it and to

fill out the online journal in between sessions. Another expectation that I have for them is to get a baseline blood testing if they don't have it already. And my expectation is that they are fully committed to work together in a partnership to help them discover their healing environment. Next, I ask them what their expectations are. It's always good to get this out on the table. My question to them is, if we work together, what expectations would you have about that work? What would you expect of me? And that allows me to be able to offer any insight into what I can and cannot meet in the way of their expectations. Now the last question I have for them is, do you have any other questions? At this point in time, there are two choices for you to make. Will you work with them or will you not work with them? If, yes, you feel like this person is going to benefit from working together with you and you choose to work with them, then what you can say to them is, you seem to be in a place ready to do this hard work. I will email you a purchase link to the package we discussed, and then it becomes your choice to work with me or not. This takes any pressure off of the table, and this is a good thing to do because most people appreciate that. So this leaves the choice to them. The email that I send to them says, thank you for meeting with me today. I appreciate your sharing all of your health concerns and understand that learning how to heal your body and to regain vitality and health is your goal as you expressed to me on our call today. I would love to be a part of that journey with you. Per our conversation, I have included the link below to purchase the package. I do look forward to working with you if that is your choice. And please don't hesitate to let me know of any questions you may have. Now, what if you realize early on that they are not a good fit? You must know and have in place your boundaries and expectations in order to determine this. If you don't know your boundaries right now, you won't recognize where they could encroach upon them or push on them and cause some consternation about accepting them as a client. So we have to look at how do we know if some clients are not a good fit. Alright, they don't have enough money for the tools. In other words, they cannot purchase the sessions, labs, supplements, or changes in food. As we discussed earlier, that's a critical part of working with you. This is your business. These are the tools in your business, and we can't just go flying by the seat of our pants. They may want to haggle over a price with you. This is the price that you have established. There are no discounts. This is the amount that you're charging for your time. They might be looking for a quick fix, the old pill for an ill type situation. They might even indicate to you that they don't have time to do the work. They may express different values, meaning that they don't know how to use the technology that you have in place, they can't fill out forms, they don't use email. All of these things are parts of tools of our business and trying to work with a client who is not able to use these tools may put you in a position of finding that you are spending much more time trying to work around this client than you feel is necessary or beneficial to you as the business owner. Now, this is your business, and this is your choice. And understand that not everyone is ready for the program that you deliver. But if you get to this point in the consultation and you discover that this person, for whatever reason, is not ready to work with you and you are not ready to take this person on as a client, then you must let them know and offer something else in return. Now you must not cast aspersions on their ability to pay or to do the work or their commitment level. You cannot blame them for you not wanting to work with them. So keep any and all personal judgments out of the

conversation. If there is a financial issue and they just can't afford to work with you, then have something else in place. I say to them, I think you are certainly ready to work on healing your body, but I understand your financial position as you've explained it to me. I have two other programs that could really help you work towards your healing goal. Would you mind if I email you the information to review and for you to see if these options might be a better fit in your healing journey? Generally, in a case where someone is financially strapped, they're extremely appreciative of what you are offering them because you're not telling them, no, I can't work with you because you don't have enough money. What you're saying is I do care about the fact that you want to heal your body and you're just not financially in a place to work with me one-on-one, but here is another solution that could really support you and I care enough about you to say let's look at this, let's try this. If there are other reasons outside of a financial issue that we've discussed, meaning they're looking for a quick fix, they don't indicate that they have time to do the work, then we have set up the structure for turning them down as a client early on when we first started the consultation. specific and we said some cases require more time than I can properly devote and that is not fair to the client if I take those. So coming back down to what we might say to that person, we could go right into it seems like there is more work here than I can accommodate at this time. Your case is very involved and would require more time than I can devote to it right now. Remember, we set up the call with this scenario and we are now taking the blame for not being able to work with them. I personally like this approach because I am using integrity and I am being perfectly truthful with them as I would not have the time to work with someone who is not ready to do the work, who may need a lot more hand-holding. Now if you really do feel that another practitioner would be able to work with them, make that recommendation directly to them using the same overview. There's more work here than I can accommodate at this time, but I know someone who would be able to accommodate that, would you mind if I send you their contact information? For someone else that may appear to do better on another program, or maybe not a one-to-one program, you could also recommend one of your smaller self-paced programs for them to start work and then potentially meet up again, have another consultation after they finish the program to see if maybe the expectations between you and this potential client are more in alignment. Again, this is our business, this is our livelihood, and there is an expectation of an exchange of services for money. If the client cannot meet these expectations and costs us time, then that time drain costs us money. And beyond that, it creates emotional challenges that can be really difficult for us, creating a loss of that sense of ease. Keeping boundaries in place protects you. It is heartbreaking to take on a client because of their story, and then find that they will never learn to heal their body because they won't commit to do the work. We must approach potential clients from a place of strength. We must be strong in who we are, and our boundaries, and our expectations, our values, our integrity, because this is truly one of the most beautiful jobs that anyone could do in the world, is to guide another human being to discovering their needs and to help them discover how to heal their body. We must take it seriously. We must take it seriously. And in order to benefit others, we must first have these tools in place.

Transcribed with Cockatoo