



DISCOVERY CALL PROCESS & SCRIPT

A **Discovery Call** is a brief, 15-minute introductory conversation designed to:

- Learn about the potential client
- Assess their needs, goals, and readiness
- Determine whether coaching is a good fit
- Recommend the appropriate program, coach, or next step
- Establish trust and provide clarity before they commit

It is not a coaching session.

It is a screening, connection, and alignment tool that ensures every client entering the Gem Makers Coaching Collective receives the right support from the right coach at the right time.

THE DISCOVERY CALL PROCESS

The process is simple, intentional, and consistent. All coaches follow the same flow to maintain excellence and alignment.

Step 1 — Inquiry & Scheduling

A woman, girl, mother, or parent expresses interest in coaching and completes a short interest form. They receive a link to schedule a complimentary Discovery Call.

Step 2 — Connection & Rapport

The coach begins by warmly welcoming the client:

- Introductions
- Purpose of the call
- Quick rapport-building conversation

This helps the client feel comfortable and seen.



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Step 3 — Exploration & Assessment

The coach asks a series of targeted questions to understand:

- What brings them to coaching
- Their current challenges
- Their goals
- Their emotional readiness
- Their level of commitment
- Whether coaching is the right solution

This portion reveals their needs, expectations, and motivations.

Step 4 — Determining Fit

Based on their answers, the coach evaluates where the individual fits best within the Gem Makers ecosystem:

Possible pathways include:

- Women's 1:1 Confidence Coaching
- Teen/Tween Coaching
- Mothers - Moms Mastery Coaching
- Mother-Daughter Building Brilliant Bonds Coaching
- Group Coaching
- Specific workshops or programs
- Courses or toolkits
- Or referral to other community resources (if coaching is not appropriate)



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Step 5 — Recommendation

The coach briefly explains:

- The best program for them
- What that program includes
- How it supports their stated goals
- Why it aligns with their needs

This helps the potential client feel guided rather than “sold to.”

Step 6 — Next Steps to Enroll

The coach outlines clear, simple next steps:

1. Complete the intake form
2. Select a package
3. Sign the coaching agreement
4. Schedule the first session
5. Receive onboarding tools/materials

Step 7 — Documentation

Immediately after the call, the coach completes the **Discovery Call Completion Form**, summarizing:

- Client needs
- Readiness
- Red flags
- Recommendations
- Next steps
- Follow-up plan



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OPENING & WELCOME (1 minute)

Coach:

"Hello ____, this is ____ with the Gem Makers Coaching Collective. It's so good to meet you! Thank you for scheduling a Discovery Call. I'm excited to learn more about you and to see how our team can support you in reaching your personal, professional or relational goals."

Coach:

"This call will take about 15 minutes. I'll ask a few questions to better understand your needs, answer any questions you have, and then share the next best steps. Does that sound good?"

(Wait for agreement)

CONNECTION & RAPPORT (1–2 minutes)

Coach:

"Before we dive in, I'd love to hear briefly what inspired you to schedule this call today."

Allow them to share — take notes.

Affirm and normalize.

Coach:

"Thank you for sharing that. You're in the right place."



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CORE DISCOVERY QUESTIONS (7–8 minutes)

Use these to assess their needs, goals, mindset, and readiness.



A. Clarity & Goals

- “What is the number one goal you want support with right now?”
- “What would you love to be different 90 days from now?”
- “If you could wave a magic wand and fix one thing today, what would it be?”



B. Confidence & Challenges

- “What challenges, habits, or fears are getting in the way?”
- “On a scale of 1–10, how confident do you feel in this area today?”
- “Have you tried anything already to make progress? What worked? What didn’t?”



C. Lifestyle & Support

- “What kind of support are you looking for — accountability, clarity, structure, encouragement, strategy, or all of the above?”
- “Do you prefer individual coaching, group coaching, or a mother–daughter approach (if applicable)?”



D. Readiness & Commitment

- “How ready do you feel to invest time, energy, and resources into this change?”
- “Is this a priority for you right now?”

(You’re listening for commitment, motivation, and alignment.)



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PROGRAM FIT ASSESSMENT (Coach Internal Evaluation)

Based on their answers, determine whether they fit best with:

For Women

- Confidence + Clarity Coaching
- Identity Work (Crowned with Confidence™)
- Confident In Your Calling (Professional Development)
- Clarity Coaching
- Accountability Coaching
- 12-Week Signature Confidence Program

For Girls

- Confidence Coaching
- Leadership Development
- Social Skills / Emotional Awareness
- Identity Building
- Life Skills Training
- Building Brilliant Bonds (Family Coaching)
- DITR (Referral)

For Mothers & Daughters

- Mom's Mastery Coaching
- Brilliant Bonds Mother & Daughter Coaching
- Brilliant Bonds Group Coaching Cohort & Community
- Conflict repair / Restoration
- Confidence-Building for both mom & daughter



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RECOMMENDATION & NEXT STEPS (2–3 minutes)

Coach:

“Based on everything you shared, here is what I recommend...”

→ Share 1–2 options MAX.

Clarity keeps them confident.

If recommending 1:1 Coaching

Coach:

“I believe you would thrive best with one-on-one coaching, where we can focus directly on your goals and create a personalized plan. Our coaching includes sessions, action steps, confidence tools, and ongoing check-ins.”

If recommending a Mother–Daughter Program

Coach:

“It sounds like you both could benefit from more structure, communication tools, and connection strategies. Our Building Brilliant Bonds coaching is designed exactly for this season.”

If recommending a Group or Program

Coach:

“We have a powerful program that aligns perfectly with what you’re looking for...”

(Briefly describe benefits, not features.)



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Then:

Coach:

"Would you like me to walk you through the next steps for getting started?"

(If yes → move to enrollment steps.)

ENROLLMENT STEPS (1 minute)

Coach:

"The next step is super simple:

1. I'll send you your onboarding link.
2. You'll complete the intake form + coaching agreement.
3. You'll schedule your first session.

Once you're in, you'll get immediate access to your welcome kit and confidence tools."

CLOSING THE CALL (30 seconds)

Coach:

"It was a joy speaking with you today. Thank you for trusting us with your goals. We look forward to walking alongside you on your confidence journey. If you have any questions at all, just reply to the email we send you."

Coach:

"Have a wonderful day, and welcome in advance to the Gem Makers community!"



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BONUS: RED FLAG QUESTIONS

Use these for screening when needed.

▼ Emotional/Mental Health Screening

- “Are you currently receiving therapy or psychiatric care?”
- “Are you looking for coaching or counseling support?”
- “Have you experienced trauma that you feel requires mental health intervention?”

If yes → refer or coordinate with leaders.

▼ Situational Red Flags

- “Is there any immediate crisis you’re dealing with?”
- “Do you feel safe at home/work/school?”
- “Has your daughter expressed harm-to-self thoughts?”

If concerning — escalate to program director.