

FOR NEW AND GROWING COACHES

The **21-Point** Discovery Call Checklist

Turn more first calls into paying clients, **without a hard sell** and without a single awkward silence.

21

checks you can tick off in one call

5

stages, from prep to follow-up

30

minutes, start to finish

1

word-for-word script to copy

START HERE

Who this checklist is for

You are a coach. People book a free call with you. They like you, they say "this was so helpful", and then they never reply. This checklist fixes that.

It is for life, career and business coaches in their first three years. It works if you run 2 discovery calls a month or 20. It does not ask you to push, pressure or use fake deadlines. It asks you to prepare, listen well, and make a clear offer.

The promise

- You walk into every call with a plan.
- The prospect does most of the talking.
- You name your price without flinching.
- Every call ends with a clear next step, yes or no.

How to use it

- Print one copy per call. Keep it next to your notes.
- Tick each box as you go. Skip nothing for your first 5 calls.
- After each call, circle the box you found hardest.
- Practise that one before your next call.

Your 30-minute call at a glance

MINUTES	STAGE	YOUR ONE JOB
■ 0 – 5	Open the call	Set the agenda and get permission to ask questions.
■ 5 – 20	Discover	Find the real problem, the cost of it, and the goal.
■ 20 – 27	Make the offer	Show how you help, name the price, then stop talking.
■ 27 – 30	Close the loop	Agree a clear next step with a date.

Stage 1 (prep) happens before the call. Stage 5 (follow-up) happens within 24 hours after it.



Quick win: send this before your next call

Add one question to your booking form: **"What would make this call a great use of your 30 minutes?"**

Read the answer out loud in your first minute. The prospect feels heard before you ask anything. Coaches who try this say the whole call gets warmer and shorter.

01 Prepare before the call

15 MIN · DAY BEFORE

Most calls are won or lost before you say hello.

- ☐ **01 Send a reminder 24 hours before, with the video link and a one-line agenda.**
WHY No-shows drop when people know exactly what will happen.
- ☐ **02 Read their booking form answers twice and note three things to ask about.**
WHY Specific questions show you paid attention, which builds trust fast.
- ☐ **03 Look at their public profile for five minutes, not fifty.**
WHY Enough context to connect; any more and you start guessing their problem.
- ☐ **04 Write down your price and your one main offer on a sticky note.**
WHY When the moment comes you read it, so you do not discount on the spot.
- ☐ **05 Block 10 minutes after the call with nothing in it.**
WHY You need time to write notes and send the follow-up while it is fresh.

02 Open the call

MINUTES 0 – 5

Lead from the first minute. A clear frame relaxes both of you.

- ☐ **06 Thank them and confirm the time: "We have 30 minutes. Does that still work?"**
WHY It respects their time and stops the call from drifting past the hour.
- ☐ **07 Share the agenda: their situation, then whether you can help, then next steps.**
WHY People relax when they know an offer is coming and it is not a trick.
- ☐ **08 Ask permission to ask direct questions and take notes.**
WHY Permission makes deeper questions feel caring, not nosy.
- ☐ **09 Say out loud that "no" is a fine answer at the end.**
WHY Taking the pressure off is what makes an honest "yes" possible.

03 Discover what they really need

MINUTES 5 – 20

This is the heart of the call. Aim to talk less than 30% of the time.

- ☐ **10** **Ask: "What made you book this call now, and not six months ago?"**
WHY The trigger tells you how urgent the problem is.
- ☐ **11** **Ask what they have already tried, and what happened.**
WHY You learn what not to suggest, and why your way is different.
- ☐ **12** **Ask what it costs them to stay stuck, in money, time or energy.**
WHY When they name the cost, your price stops looking big.
- ☐ **13** **Ask them to describe life 90 days from now if this goes well.**
WHY A clear picture of success gives your offer something to point at.
- ☐ **14** **Ask "What else?" at least twice before you move on.**
WHY The first answer is the polite one. The real reason comes second or third.
- ☐ **15** **Sum up their situation in their own words, then ask "Did I get that right?"**
WHY Feeling truly understood is the main reason people choose a coach.

Questions to avoid

- **"So, tell me about yourself."** Too open. They talk for ten minutes and you learn little.
- **"Would you like to work with me?"** Too early. Ask it only after item 15.
- **"Is money an issue?"** It plants a doubt. Talk about the cost of the problem instead.

CALL NOTES · THEIR WORDS, NOT YOURS

04 Make a clear offer

MINUTES 20 – 27

If you can help, say so plainly. If you cannot, say that too.

- ☐ **16** **Ask: "Would it help if I shared how I would approach this with you?"**
WHY They invite the offer, so it never feels like a pitch.
- ☐ **17** **Link each part of your program to something they said earlier.**
WHY Their own words make the case far better than your feature list.
- ☐ **18** **Name the price once, in a calm voice, and then stay silent.**
WHY Filling the silence with a discount tells them you doubt your own price.
- ☐ **19** **Ask "What questions do you have?" and answer concerns with curiosity, not defense.**
WHY A concern is a request for more information, not a "no".

05 Close the loop and follow up

MINUTES 27 – 30 + 24 H

Never end a call with "let me know". You own the next step.

- ☐ **20** **Agree a next step and a date before you hang up: start date, a second call, or a clear "no".**
WHY Most "I'll think about it" calls die because nobody set a date.
- ☐ **21** **Send a short recap email within 24 hours, using the template on the next page.**
WHY A written summary of their goals keeps the feeling of the call alive.

21

Score yourself after each call

18 to 21 ticks: a strong call, whatever the answer was. **13 to 17:** good, pick one gap to fix.
12 or fewer: go back to Stage 1 and slow down.

The 24-hour recap email

Use this for item 21. Swap the highlighted parts for your own notes. Keep it under 150 words.

SUBJECT

Our call today, and your next step

OPENING

Hi **Jordan**, thank you for your time today. I enjoyed hearing about **your plan to move from team lead to head of design**.

WHAT I HEARD

Right now **you spend your evenings on work you should delegate**, and it is costing you **time with your kids and your energy for the bigger role**. In 90 days you want **a clear case for promotion and two free evenings a week**.

THE OFFER, IN ONE LINE

My **12-week Step Up program** is **\$1,800**, or three payments of **\$600**.

NEXT STEP

As we agreed, I will call you on **Thursday at 4 pm**. If you want to start before then, you can book your first session here: **example.com/start**.

SIGN-OFF

Talk soon, **Nadia**

A mini case story

Priya is a career coach in her second year. She booked about 12 discovery calls a month but closed only 3 of them. Her calls were friendly, ran past 50 minutes, and ended with "let me know what you think".

She used this checklist for eight weeks. The two items that changed the most were item 12 (ask about the cost of staying stuck) and item 20 (agree a dated next step). Her calls got shorter and her follow-ups got easier, because each one had a date already set.

"I used to dread the money part. Now the prospect has already told me what the problem costs, so the price just makes sense."

PER MONTH	BEFORE	AFTER
Calls held	12	12
New clients	3	6
Close rate	25%	50%
Call length (min)	52	31

2×

more new clients from the same number of calls.

Priya is a fictional, illustrative example. Your results depend on your niche, your offer and your practice.

WHO MADE THIS

About the coach



Hi, I am Nadia Ferreira. I help new coaches fill their practice without feeling like a salesperson.

I spent nine years in corporate learning and development before I started coaching. In my first year I held 40 discovery calls and signed 6 clients. I did not need a better offer. I needed a better call. This checklist is the system I built to fix that, and I now teach it to coaches in my group program, Full Calendar.

8 yrs

coaching full time

300+

coaches trained

1,500+

discovery calls reviewed

Want a second pair of ears on your calls?

Book a free 20-minute call review. Send me one recorded discovery call, and I will show you the two checklist items that will make the biggest difference for you. No pitch unless you ask for one.

Book your free review at example.com/review

Prefer email? Write to hello@example.com. I read every reply.

Keep going

- **Print a fresh copy** for each of your next five calls.
- **Share it** with a coach friend and practise items 12 and 18 on each other.
- **Look out for my email next week:** "Five objections and what they really mean".

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