

# The Quick Audit Script

## WELCOME

Thanks for being on time. I really appreciate it.

I've got 15 minutes booked on my calendar and we'll have to keep to time as I have somebody right after you.

I'm excited about this call with you today. My job on this call is simple. It's to find out more about <insert your area of expertise and their problem> and to see if I can help you. I'll be asking you a bunch of quick questions to learn more about you.

If I can't help you, I'll let you know right away and do my best to point you in the right direction.

If I feel I can help you, we'll set up another time to talk about how.

Does that sound OK to you?

Great, let's get started.

## NEXT ROUND OR NOT

### NOT A FIT

The purpose of the call today was to find out more about you and your XYZ challenge and see if I could help. Now that I know more, it's clear I'm not the right person for you.

Insert <recommendation/refer/resource> if you have one.

Thanks for your time.

I wish you all the best with your next steps.

### A GOOD FIT

The purpose of the call today was to find out more about you and your XYZ challenge and see if I could help. The good news is I help people with your challenge all day long!

As I said at the start of the call today, the next step is for us is to set up a time to talk about how I can help you in greater depth.

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My assistant will be reaching out to you to set up that session / go to <insert calendar link> to book it directly on my calendar now / let's open our agendas and get it booked now.

(Give them any preparation/reflection/assessments for that next session.)

When we talk, I want to focus on 3 things: How you want your XYZ to look in a year's time. The clearer we are about how you want it to be, the easier it is for us to make a plan to get you there. Then we'll talk about what's happening right now, what's working, and what's not – so we're both clear on the starting point. Then lastly, it's a question of finding out what the obstacles are that are holding you back, so we can make a plan.

It's been great chatting with you today. I've got plenty of notes from our conversation so we can dive straight in next time we talk.

I look forward to talking again soon.

(Give last reminder to get the next session booked if not doing it directly)

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