OVERVIEW

Program Disqualifiers

Decide who should NOT buy — and say it kindly.

CLIENT / NAME	COACH	SESSION DATE

P Purpose

Define the situations, conditions and expectations you will decline or redirect, and script the referral conversation.

W Why this matters

Disqualifiers protect three parties at once: the client who needs different help, your schedule, and the integrity of your results. Saying who it is NOT for makes the yes stronger.

1 Beyond scope

Work here
List presentations you will not coach (clinical, legal, crisis) and the professional you refer to instead.

2 Wrong expectations

Work here
Which buyer expectations will you decline — guaranteed outcomes, someone else's homework, emergency availability?

3 Wrong fit for the method

Work here
Which situations need a format you do not offer (couples, teams, minors)?

4 The referral script

Work here
Write the two sentences you will say when declining — warm, specific, with a next step.

5 Publish kindly

Work here
Decide where to state disqualifiers publicly (offer page FAQ, discovery call, intake form).

- [ ] Offer page FAQ
- [ ] Discovery call
- [ ] Intake form
- [ ] Both call and form

R Read it back

READ-BACK

Read your referral script aloud. Could you say it to a frightened person and leave them more hopeful than before?

YOUR NEXT MOVE

Add the referral script to your discovery call notes. Review this tool every quarter alongside Tool 20.