



# Initial Assessment

## Convert With Confidence

### RAPPORT

I know how difficult it was to come in today, but I am happy that you've decided to come.

You've made a really good decision by deciding to start here.

How did you hear about us?

### AGENDA

I've set aside 30-minutes to explore your situation and decide how best to move forward.

Tell me a little about your story.

(If it gets too long) Let me interrupt with just a few crucial questions that I need to ask. (go into initial consult questions)

### WHY NOW?

Why today? Is it urgent? Where are you in the process?

### VISION

What do you want to say about your marriage when this is done? What would it look like if this process was very successful for you? (Listen to their words. You'll use them in Value.)

### REALITY

What are the dynamics right now in your marriage?

What do I need to know about your situation?

### ROADBLOCKS/IMPACT

What prevents you from getting to that future that you envision after this divorce?

How does this impact you?

What happens if you don't get the answers you're looking for?

### VALUE

Re-cap and re-state. You want 'abc', but the reality is '123.' And you said 'xyz.' Is that accurate? Does that sound right?

### SOLUTION

This is exactly what we do for our clients every day. We help people just like you to 'abc.' Based on our conversation, I can clearly see that you need . . .

### YOU'RE HIRED!

Would you like our help?

How would you like to proceed from here?