One-To-One Case Study Process To Get Clients With Integrity

Step 1: Send the **Sample E-mail or WhatsApp message** to your friends, family, associates and/or organisations to let them know about EFT, how it can help relieve stress, and how you are seeking case studies and practice sessions.

1. Email Sample Message to send,
http://vitalitylivingcollege.info/wp-content/uploads/2021/08/Email-message-for-Body-Vitality-Practitioners-in-Training-to-send.pdf

2. WhatsApp Sample Message to send,
http://vitalitylivingcollege.info/wp-content/uploads/2021/08/Whatsapp-message-for-Body-Vitality-Practitioners-in-Training-to-send.pdf

Step 2: Once you have someone who wants to be a case study client send them the Transformation Program Intake Form either via e-mail or WhatsApp, and request them to fill it in.

Explain to them the process involved:

- Once they fill in the form and send it back, you will go through the form and then give them some appointment options to book a consultation call.
- The consultation call is a no-obligation conversation to establish what they want, and how you can help them.
- Once the consultation call is completed, you will agree to the date and time of the first appointment, and send an appointment letter to proceed with the case study sessions,

1. Email Intake Form to send, http://vitalitylivingcollege.info/wp-content/uploads/2021/08/Body-Vitality-Transformation-Program-Intake-Form-For-Case-Studies.pdf

2. WhatsApp Intake Form to send, http://vitalitylivingcollege.info/wp-content/uploads/2021/08/WhatsApp-Transformation-Program-Intake-Form-For-Case-Studies.pdf

Step 3: Once you receive the form, read it and understand what they want.

Check that they are 10/10 committed to the work as per the Intake Form. If they are not, make a note to clarify it in the consultation call. Jot down any notes on what they want and any clarification questions you might have. Once you are clear you can proceed with a consultation call, go ahead and book it with them.

The purpose of the consultation call is to:

- Be on the same page about what your client wants and to clarify any expectations and questions
- Check the commitment level. If it is less than 10, then have a conversation about it and explore if the desired outcome needs to be revised so that the commitment is 10/10
- Clarify what they want to explore (from Question 6 in the Intake Form) and their desired outcomes by asking them, *"How will you know you have achieved your priorities?"*

Step 4: Once your case study client decides, that they want to proceed with the appointment, go ahead and verbally explain to them the following:

- The appointment lasts between an hour and an hour and fifteen minutes, but to block out an hour and a half, just in case.
- The sessions are private and confidential and will be focussed on the emotional and mental aspects of what they want to explore. It is not a replacement for medical or mental health treatment.
- If they feel they need medical or mental health treatment then it's recommended that they seek the help they need.
- They may want some time for themselves after the appointment. Some people have lots of energy afterwards and some people feel drained.
- You will be recording the case study either in the form of notes, a video or audio for the purposes of submitting your case studies. The information is only for the Trainer to evaluate the case studies.

Step 5: Book the appointment and send out the appointment letter. You can make it into a PDF file and send on WhatsApp too.

Appointment Letter to Send, http://vitalitylivingcollege.info/wp-content/uploads/2021/08/Transformation-Program-Appointment-Letter-Body-Vitality.pdf

Step 6: On the day of the sessions, 30 minutes prior:

Make sure the space you are going to use for your session, even if online, is physically and energetically clean and clear.

Close your eyes and send yourself your unconditional love. Send them your unconditional love.

If need be, tap on yourself or do a short surrogate tapping for them. Read their Intake Form again. Show up on time for the session.

At the start of the session ask them:

- *"What happened since we last spoke?"*
- *"What do you want me to focus on today?"*

Cross check mentally if it's in line with their Intake Form. If it's in line with their Intake Form, please proceed to Step 7. If it's not in line with their Intake Form, then explore it with them.

You can mention:

- *"So how is what you want to work on today connected to what you mentioned are you priorities in your Intake Form?"*

- *"So, if I got this right, you want me to focus on [ADD THEIR WORDS]. Can you explain to me how it is connected to the priorities we agreed on during the consultation call?"*
- In case they are not connected, ask, *"Do you want to amend your original priorities, based on what you want to work on today?"* Go with what your client wants, and if need be, manage their expectations.

Start conducting the session.

Step 7: Let the session flow and keep an eye on the time.

If there are new aspects coming up as you notice you have 10 minutes left, let them know, *"We have 10 minutes left, where would you like me to focus?"*

Session time must be anywhere from one hour to one hour and thirty minutes. In the learning phase, it can be one hour and thirty minutes. Close the session with positive tapping.

Step 8: Say goodbye. After they leave, send them your blessings silently and hand over everything to the Universe. If you feel drained in any way, take a salt bath and drink some warm water with a little ginger.

Step 9: Write some brief notes at the end of the session to jog your memory when you come to writing up your case studies:

- The Issue (presenting problem or what the client wants)
- Questions asked
- Tapping sequences used
- Techniques used
- How did you overcome the challenges?
- What made you decide to do what, when?
- What did you do well?
- What can you do better?
- What would you do differently next time?
- What are your overall learnings?

If you want to write up the case study, go to EFT Practitioner Grad Page , and click on the Case Studies Guideline link. Review all that is involved in writing up a case study. We will go into it in detail during Mentoring & Supervision.

Step 10: Celebrate.

Tap on, *"Even though I was not sure how to begin, that was then and this is now and I have done it perfectly and I love and accept myself."* Send a message on the group letting us know - you did it!