



Discovery Call Conversation Guide (Template)

Purpose: To find out about the prospect's goals, understand *if* and *how* we'll be able to help them.

How To Use This Guide: Structure your initial discovery calls using the 3-section framework used in the template below: **Intro, Discovery, and Close.**

Tailor the content for your company/industry providing room for the sales rep to make each conversation flow naturally. After each question, the rep should take time to reflect on and/or confirm the prospect's responses. The call should feel consultative, engaging, and should help both parties decide whether to proceed with the next step of the process.

Use bookmarks for each of the three section headers to make the guide easy to navigate. The guide should be practiced by the rep until it no longer sounds rehearsed.

Fillable Template

Intro

Discovery

Close

Intro:

*Hello! I'm **(Name)** with **(Company)**, and we help **(type of businesses)** with **(valuable things you do for companies)**. I'm looking forward to digging into what brought you to our call today, and the related business goals that you need help with.*

*We'll be discussing some specific aspects of your **(client area of concern)**, and will leave some room at the end to go over any questions you have for us. Would you mind kicking us off by giving me an intro to your company and what you'd like to discuss?*



Listen to the prospect, taking note of any of the discovery questions they may answer naturally without being prompted. Take notes and continue.

Discovery:

*Thanks for sharing. Now, what's the specific **(aspect of the initiative)** you need help with? If you've done any work on it so far, tell me about that as well.*

Repeat back what they've shared. Pause to take any notes and continue.

What are your goals for this initiative?

Take note and get any clarity needed on their goals.

How have you arrived at that goal?

Next, discuss the technical side of their project.

What support do you need with your process?

- a. Ask about specific needs they'll likely have that align with the service you provide.*
- b. Add more relevant questions as needed...*
- c. Until you've covered all questions that can relate back to your scope of work.*

Qualify.

What is the anticipated size of the project?



How much were you looking to invest in making this project come to fruition?

Will anyone be involved in making the decision for picking a partner to work with you on this project?

How soon do you need to get started?

Close:

If they are not qualified:

***(Prospect Name)**, thanks for all you've shared today. After hearing more about your current setup, I don't think we have the right solution for you. But, I'm going to follow up with a recap of our call today and encourage you to reach out to us in the future.*

If they qualify:

***(Prospect Name)**, thanks for all you've shared today. What I understand is that your project will include **(describe their project to them briefly)** and that the goal for your project is **(state specific KPI/goal)**.*

*I suggest that we put together a custom plan taking everything you've shared in consideration. We can also review some of our case studies so you can understand what our process is like and the kind of results our clients see while working with us. Do you have 30-45 minutes open on your calendar **(offer a couple of days/times)**?*

*Great, I'll send you an invitation for that call. Again, I appreciate your time today and look forward to speaking to you again on **(Proposal Call Date)**.*