TG SalesAgency

Discovery Call Conversation Guide

Use this guide to build rapport and establish mutual fit between you and your prospects.

Overview

Welcome to the Discovery Call Conversation Guide for B2B services. This guide is designed to help you conduct effective discovery and move your prospects to the next step of the funnel by using this 3-section framework: *Intro, Discovery, Close.*

Key Objectives:

- Make introductions and align on the purpose of the meeting.
- Learn about the prospect's goals, if and how you can help them.
- Address prospect's specific needs and pain points.
- Qualify the prospect for receiving a custom proposal.
- Agree on a day and time to walk through the proposal live with the prospect.

Before the Call:

- Review the prospect's profile, any previous history and notes.
- Conduct research on the company and individuals listed as meeting attendees.
- Prepare relevant questions and talking points.

Intro

In a friendly and concise manner, lead introductions between all parties and set expectations for the call. Your introduction should help the prospect understand what you do but not feel like a sales pitch.

Script Part 1

Hello! I'm [Your Name] with [Company], and we help [Type of Business] with [Product or Service]. I'm looking forward to digging into what [Prospect Company Name] is currently doing, and what you'd like to achieve as you move forward.

We'll be discussing some specific aspects of your objectives and leave some room at the end to discuss any questions you have for us. Would you mind kicking us off by giving me a quick intro to your company and what made you decide to have this call with us?

Listen to the prospect, taking note of any of the discovery question information they provide without being prompted. Take notes. Then, continue.

Discovery

During this part of the call, it's important to complete mutual qualification and gather information that will be needed to draft the prospect's custom proposal.

Script Part 2

Thanks for sharing. Now, what's the specific 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?

What challenges have you encountered when working toward your goal?

What kind of help do you believe you need?

Qualify.

How much were you looking to invest in this project?

Will anyone be involved in making this decision?

How soon do you need to get started?

Close

Now you should understand the lead's needs, and whether your company has the right solution for them. Your job is to either gracefully end the process or move your prospect to the next step.

If they are not qualified:

[Prospect Name], thanks for all you've shared today. After hearing more about your current situation, I don't think we're the right fit for you. But I encourage you to reach out to us again should anything change in the future.

If they qualify:

[Prospect Name], thanks for all you've shared today. What I understand is that your project will include [Brief Project Description] and that the goal for your project is [Specific KPI/Goals]. Did you have anything else to add, or questions for me?

Take notes as needed and continue.

I suggest putting together a custom plan for you which we can review on our next call, along with some of case studies and details on our process so you can see what it's like working with us. Do you have 30-45 minutes open on your calendar for [2 Alternative Dates/Times]?

QUICK TIPS

Red Flag Statement: "Send me your proposal".

If the prospect does not want to review the custom proposal with you on a call, proceed with caution. There could be various reasons for it but unless there's a good explanation, this is a classic indicator of low purchase intent.

Agree with prospect on the next step.

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].

Summary

This Discovery Call Conversation Guide works best when adjusted to meet your company and industry needs. By customizing and memorizing the framework, sales representatives can deliver consultative and engaging calls that compel prospects to take the next step in their sales journey.