

DISCOVERY CALL CHECKLIST

GOALS OF THE CALL

- Build rapport and develop trust
- Understand the prospect's pain points
- Identify key decision makers
- Secure a follow up meeting

NOTE

The call should last 10-15 minutes depending on the complexity of the prospect's pain point. Only ask questions that are applicable to your unique prospect.

INTRODUCE YOURSELF AND WHY YOU'RE CALLING

If the prospect seems uninterested, proceed to more qualifying questions around budget and timeline so you don't waste time on tire kickers.

- Hello, [PROSPECT'S NAME]? It's [YOUR NAME] calling from [COMPANY].
[\(Pause to gauge reaction. Receptive or not?\)](#)
- I saw you downloaded an ebook on [TOPIC] and wanted to see if you got everything you were looking for help with. What were you researching when you found that ebook?
- [\(If they were looking for help with something\)](#) Find out why they were looking for help.
- [\(If they were NOT looking for help\)](#) "Not a problem. We produce a lot of ebooks and webinars and not everyone gets to consume the information as soon as they get it."

BUILD RAPPORT

Be human first and a salesperson second. Get to know your prospect. Spend 5-10 minutes researching something that you can discuss to build rapport.

- I see that your company is located in [NAME OF CITY]. I went there on a trip last month. Is your office located right in the city? Have you ever been to [NAME OF RESTAURANT / OTHER LOCATION].
- I saw on Twitter that you...

PROVIDE HELPFUL RESOURCES

This will encourage them to see you as a trusted advisor.

- Since you downloaded our ebook about [TOPIC], you might be interested in another piece of content, [NAME OF CONTENT].
- I'd be happy to send you more resources.
- [Read an example sound bite of how reps at Datanyze offer more resources.](#)

GET THEM TO OPEN UP

Have a conversation, not an interrogation. Practice emotional intelligence.

- Tell me what your day-to-day is like at [COMPANY].
- How many customers do you support right now?
- How focused are you on growing your customer base? By how much?
- Do you see anything getting in your way of bringing on [NUMBER] new customers?
[\(Digging up more challenges\)](#)

INTRODUCE POSITIONING STATEMENTS

A positioning statement shows our prospect that we understand their pain points. It's okay if the first one doesn't resonate. Prepare three different positioning statements and use them to uncover different pain points.

- When I talk to emerging businesses, they often face the challenges of [CHALLENGES].
- Are these challenges that you face as well?
- [Read an example of how reps at HubSpot use positioning statements.](#)

DIG DEEPER INTO THEIR PAIN POINTS

Your prospects are very vulnerable when they're sharing their biggest challenges. Practice empathy and show that you truly want to help.

- Tell me more about that...
- How big of a problem is this? Why is that?
- What is the impact or consequence of this challenge on the business?
- Who else is affected by this challenge? ([Finding other stakeholders](#))
- What are your plans to address those challenges?

TELL A RELEVANT CUSTOMER STORY

By telling a story about a customer with the same challenge, you imply that you've helped them overcome it. This puts the prospect at ease to hear that there's a solution.

- Your situation sounds a lot like another company, [NAME OF COMPANY]. They were having trouble with [PROBLEM]. Then they started using [SOLUTION]. Now they [NEW AND IMPROVED SITUATION].
- Is this something you'd be interested in trying out?
- [Read an example of how reps at Datanyze tell customer stories.](#)

SET UP NEXT STEPS

Don't make this about pushing your timeline or you might push them away.

- Based on what you've told me about [RECAP THE POINTS THEY COVERED], it sounds like it makes sense for us to schedule a 30 minute call in the next few days to discuss your goals in more depth and explore how we could help you reach those goals.
- Would you want to schedule that follow up call?
- I'm available tomorrow at 00:00am and the following day at 00:00pm... do you have your calendar in front of you?
- Who else would see value in the next conversation? ([Finding decision makers](#))
- I'd love to send you some more information about what we've discussed. Will you have time to review it before our call?
- Great! I'm looking forward to connecting again soon.