

THE ULTIMATE SALES CALL CHEAT SHEET

FOR B2B DISCOVERY CALLS

HOW TO USE THIS

Call goals are on the left. On the right, see a variety of fresh and time-tested discovery questions designed to move deals forward. Take what you need and succeed.

CALL OBJECTIVES

- ✓ Build Rapport
- ✓ Identify Needs
- ✓ Establish Technical Compatibility
- ✓ Define the Process
- ✓ Gauge Urgency
- ✓ Identify Competitors
- ✓ Plan Next Steps

BUILD RAPPORT

Relationships are the X factor in sales success. Demonstrate that you're curious, informed and likable right from the get-go.

Career & Connections

- ☐ So how did you get involved with [company name]?
- ☐ Oh I see you worked at IBM. My brother works there. How did you like it?

Local News

- ☐ I see you're based in Charlotte. Were you affected by that huge storm that was on the news?

Interests

- ☐ I saw you tweeted about the conference. What did you think of it overall?
- ☐ Oh I see you're from Boston. Did you watch the Patriots destroy the Bucks last Sunday?

Personal History

- ☐ I noticed on LinkedIn that you used to live in Seattle. Do you miss it?

IDENTIFY NEEDS AND CHALLENGES

Identifying your prospect's individual needs and challenges is vital to personalizing your conversation.

General Scoping

- ☐ What are some challenges you're looking to solve?
- ☐ How have you tried to solve those problems so far?
- ☐ What are you using right now?
- ☐ What part of your job is most frustrating?
- ☐ Can you envision our solution helping you achieve [one of their primary goals]?

If They Have a Current Solution in Place

- ☐ What led you to consider making a change now?
- ☐ Do you think your job would be easier if you had access to [your competitive differentiation]?

ESTABLISH TECHNICAL COMPATIBILITY

Making sure there are no technical roadblocks should be a top priority.

- ☐ What CRM are you using?
- ☐ What other tools are you using?
- ☐ What systems do you need to integrate with?
- ☐ Is there any reason your team can't use [your requirement]?

DEFINE THE PROCESS

It's far easier to move deals forward if you can agree on a process.

Identify Key Stakeholders

- ☐ In addition to yourself, who else at your company is part of the decision making process?
- ☐ Are there any issues that other stakeholders may be concerned with?

Discover Their Buying Process

- ☐ What's your purchasing process?
- ☐ Who's the executive sponsor for something like this?

GAUGE URGENCY

Discussing timing can help you discover how sales-ready the prospect is.

Uncover Their Timeline

- ☐ In an ideal world, when would you like to get started?

If an Existing Solution is in Place

- ☐ When is your current contract up?

Identify Their Implementation Plan

- ☐ Who on your team would be in charge of implementation?
- ☐ What has your process been like when you implemented similar solutions?

IDENTIFY COMPETITORS

Understanding your competition is key to bringing home the win.

Discover Whether the Deal is Competitive

- ☐ Are you looking at any other products at the moment?

Gauge Their Experience with Competitors

- ☐ What has your experience been with [competitive vendor]?
- ☐ How do you feel about the way we compare to other solutions you've looked at?

PLAN NEXT STEPS

As your call winds down, identify next steps and discover how to best move the deal forward.

Plan Next Steps

- ☐ When would be a good time to follow up with you about what we discussed?
- ☐ Who else on your team should see the product?

Inquire About Follow-up Collateral/Materials

- ☐ Have you read any of our case studies? If not, would you like me to send you one?

DISCOVERY CALL PREPARATION CHECKLIST

You can't research every prospect exhaustively, but it pays to be prepared for high priority accounts. This sample checklist will help you personalize your messaging around factors like their role, what they sell, who they sell to and more.

✓ Personal

- ☐ Where did your prospect go to college?
- ☐ Has your prospect lived/worked in a location you're familiar with?
- ☐ What has your prospect posted on social media recently?
- ☐ Do you have any contacts or interests in common?

✓ Significant Events

- ☐ Has the company had any big news lately (e.g. funding rounds, acquisitions, big wins)?
- ☐ Is the prospect in a new role?

✓ Roles

- ☐ How long has your prospect been in their current role?
- ☐ What kinds of challenges do people in that role typically face?
- ☐ What are a few common success metrics for individuals in their role?
- ☐ What are a few ways your solution specifically helps people in their role?
- ☐ What are some common objections raised by those in their role?
- ☐ What is the quick elevator pitch you'd give to an individual in their role?

✓ Industry & Competition

- ☐ What industry do they play in, and what kinds of industries do they sell to?
- ☐ Do you have any success stories with other companies in their industry?
- ☐ What are 2-3 companies they compete with?

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Dallas Hogensen
Head of Sales



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