BLUEPRINT

Perfect Discovery Call

Winning by Design

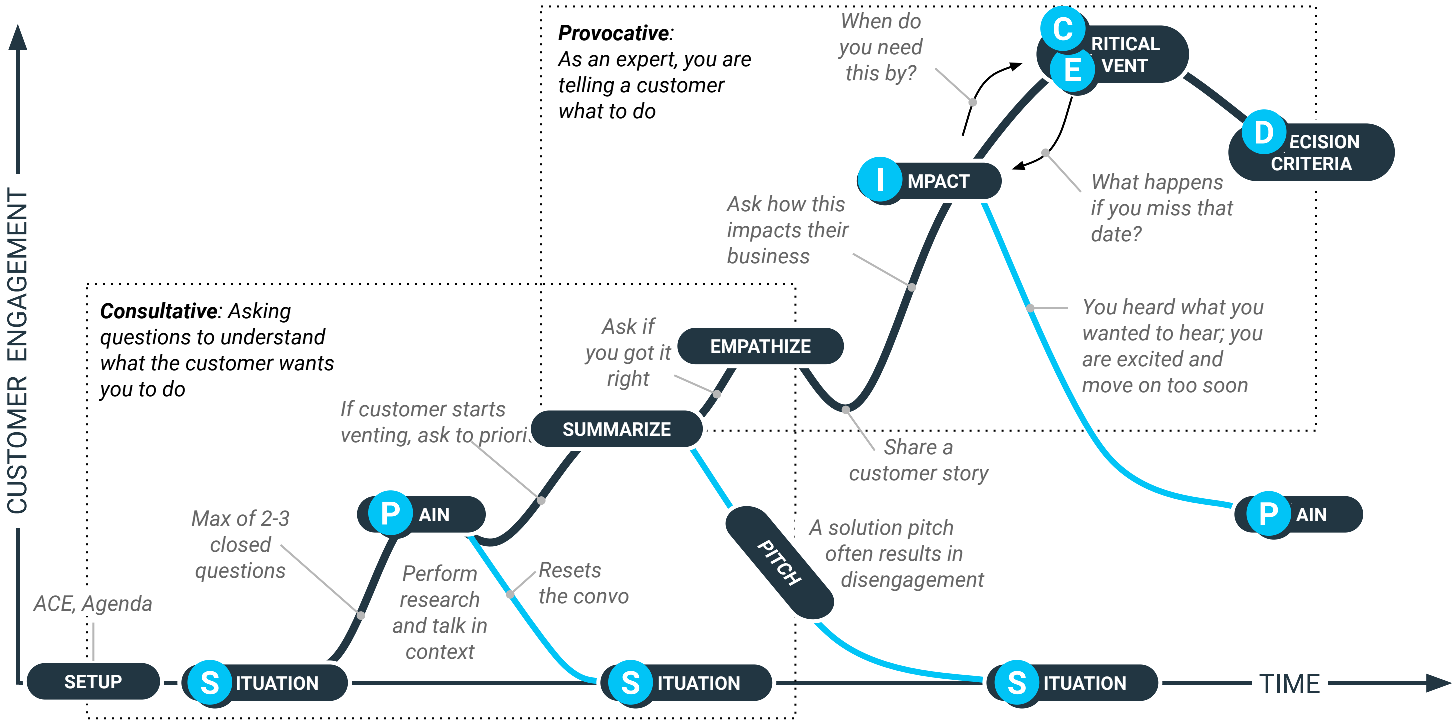


Figure 1: The SPICED Framework applied to a Discovery Call

Questions are fundamental to the selling process — they're the only way to diagnose a prospect's problem. When the right questions are applied in customer meetings, they become a powerful tool, especially when you act as an expert and properly structure the conversation. Luckily, meetings have a repeatable framework you can follow to be effective.

"Prescription before diagnosis is malpractice."

Prospects don't care about your features and functions as much as they care about whether you can help them. Don't give the solution to a prospect before you fully understand their problem.

Here's how professionals run effective meetings.

Preparation

Research the person you'll be speaking with. If your company has already had conversations with that person or others at their company, review those notes to find out what they have said they care about.

Check LinkedIn for notable insights (e.g., were they just promoted? Recent funding round? New product launch?). Make a note of these, so you can show that you care.

Opening the call: How to transition to a business conversation

The best start to a meeting accomplishes three things. It sets the expectations of what you'll accomplish, the time you have allotted to meet, and the end goal of the meeting.

Discovery calls need to be conversations, not one-way sales pitches. The prospect needs to know they have control and feel that their concerns will be addressed.

Your opening should take about 45 seconds. ACE is a great framework for getting off to a professional start.

ACE your opening

The goal of this simple framework is to help you spend your brainpower with active listening, not thinking about what to say at the beginning of a meeting. Here's how you open:

- **Appreciate** → "I appreciate you taking the time for today's call."
- **Check End Time** → "We have 30 minutes scheduled to speak today. Does that still work for you?" (remember to listen to their response and adjust your call time if necessary)
- **End Goal** → "The end goal of this meeting is to understand your requirements and see how we can potentially help. If you think it's a good fit, we'll discuss next steps."

By using the word "appreciate," you trick your brain into executing a pattern. This is known as a "chunk." Chunking will help you perform on autopilot at the beginning of meetings and help you decide where to take the conversation next.

Confirm the agenda. Then what?

Confirm the agenda you sent in your calendar invite by quickly telling the prospect what you plan to cover during the meeting. Then ask:

"What else do you want to get out of today's meeting?"

This open-ended question is deceptively powerful. It will cause your prospect to pause for an instant, and if they answer, it's usually their number one priority or issue they want to solve. Learning their top focus in the first 90 seconds of a call is incredibly valuable.

If there are fewer than five people on the call, ask everyone what they're looking to get out of the meeting. Write down each of their names and responses, and make sure you address their top priorities before the end of the call. If there are more than five people, ask your champion or stakeholder to answer on behalf of the group. Starting off like this helps the group realize that this is going to be a two-way conversation.

Diagnose before prescribing: SPICED

This is where the bulk of the meeting time is spent. Use question-based selling to figure out what your prospect is actually looking to solve. Ask them questions to understand their situation first. Then move into questions that help clarify their pain and desired impact.

Situation

Begin with situational questions that show you have done some research, but also help you qualify the prospect based on basic minimal requirements. These are closed-ended questions that help set the context.

Pain

When you begin asking pain questions, don't just ask the generic and overused "*What keeps you up at night*?" Ask more thoughtful questions like, "*When speaking to other Directors of Sales, they usually mention that challenges* X, Y *and* Z *are their top priorities to solve. To what extent is [X challenge] important to you?*"

Summarize what you've heard before moving forward. This demonstrates that you're actively listening and actually care about helping them.

Storytelling

Early in the sales conversations, prospects care more about how their peers solved a similar challenge than hearing how good a particular solution is. Share a customer story that relates to their situation and pain — even better if it involves a similar persona or job title as the prospect you're speaking with.

The key is to make sure your story includes a relevant use case and a pain that you've just identified they're currently facing. When the meeting is over, your prospects will remember stories much more than facts and features.

Discovery Call – Checklist

BEFORE THE CALL

- ❑ **Check your technology:** Dial in, set up your screen share, etc.
- ❑ **Set up your tabs:** Close apps, switch off real-time status updates.
- ❑ **Send out courtesy email:** "Whenever you're ready, here are the dial-in details ...."

OPEN THE MEETING

- ❑ **Let people introduce themselves:** Write down their names.
- ❑ **Introduce yourself:** Helps establish control of the meeting.
- ❑ **Ask for approval to record:** *Since Jack can't join the meeting, do you mind if we record this...*
- ❑ **Inquire about their goals:** *What would you like to achieve in this call?*

PERFORM "ACE"

- ❑ **Appreciate:** *Appreciate you making time for the call today*
- ❑ **Check end time:** *Does ending at 10:30 still work for you?*
- ❑ **End Goal:** *This call typically concludes with you achieving...*
- ❑ **Take notes (and let them know):** *Can you spell that for me...*
- ❑ **Present agenda, then ask:** *What else would you like to add?*

DIAGNOSE THEIR SITUATION: LISTEN AND LEARN w/ SPICED

- ❑ **Ask SPI questions:** Few S, few P build to I.
- ❑ **Check off your "customer centric sales criteria".**
- ❑ **Decision Criteria:** *Why is that important to you? What happens if that doesn't occur?*
- ❑ **Critical Event:** *What is driving the urgency?*
- ❑ **Decision Process:** *What are the steps to get you there?*
- ❑ **Summarize:** *To confirm... did I get that right?... anything else?*

CLOSE

- ❑ **Verify "End Goal" from ACE:** *To your point... we address that with...*
- ❑ **Next steps:** No more than 3 actions. Connect the wagons, set up the next meeting
- ❑ **Summarize:** 3-point summary; shorter is better
- ❑ **Questions:** Ask if there are questions that arose from the meeting
- ❑ **End everything:** Close the call, stop sharing your screen
- ❑ **Follow up immediately:** Actions: <60mins. Thank You note: <8 hours

Impact

Now you can begin to transition the prospect from emotional to more rational decision making. Attempt to quantify the value of your solution. Ask the prospect questions that describe the impact a solution like yours could have on the company.

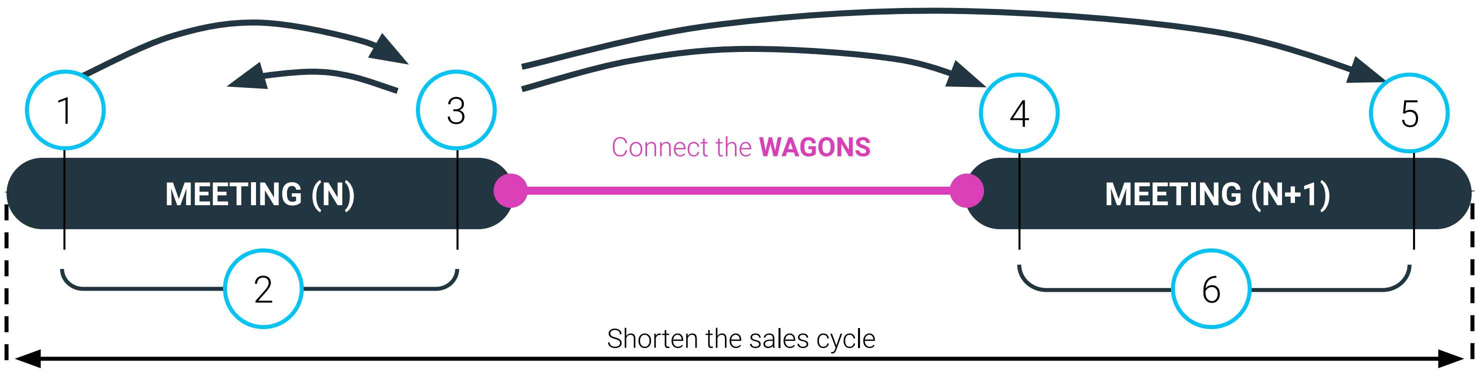
Discussing impact during the discovery call helps you close deals. The ROI of your solution is uncovered through value-based, open-ended questions.

Connecting the wagons

At this point, you need to share how specific parts of your solution address each of the pain points that your prospect wants to solve. Show how Feature X will generate more ROI, or how Dashboard A will give them the visibility they need to solve their top priority.

As you wrap up, ask if all their concerns were addressed and if their end goal was achieved. Then connect the wagons by scheduling the next meeting. Consider asking, "*Who else on your team would benefit from joining our next meeting*?

Connecting the wagons (continued)



STEP	DESCRIPTION	PREPARATION
Open	Exchange pleasantries. Ask for approval to record and take notes. Distinguish the different voices and who they belong to. Begin in a friendly tone that adds energy to the call. Start a conversation to get the group talking.	Review LinkedIn profiles to research who you are speaking with.
1. ACE	Orchestrate the call, verify time, set the end goal, and engage: A **Appreciate:** *Appreciate you taking the time.* C **Check Time:** *Are we still good for 30 minutes?* E **Verify End Goal:** *The end goal of this call is to...* Ask: *Does that sound right?*	Prepare a one-sentence "end goal" from the prospect's perspective, stating what they want to achieve on this call.
2. Agenda	• **Confirm the agenda:** *I prepared an agenda for us today...* • **Attendees:** *What else would you like to get out of this call?* • **Involve everyone:** *How about you, Danny?* • **Ask:** *What is most important to you?*	• Send calendar invite • Include executive brief • Multiple attendees? • Reconfirm meeting 24hrs/15 min before
3. Wagon	Take control of the conversation: *In the interest of time...* Reorient them on the agenda and time: *We have 5 minutes left to set up the next steps... or can we extend by 10 minutes?*	• Review notes • Keep track of time
	Look back: *Did we address your questions?* Follow up on the ACE: *At the beginning of the call, we said...* Close: *Are you ready to move forward with...*	Prepare what to ask for! This should be aligned with ACE.
4. Connect	Connect the wagons: *Let's schedule the demo call. Have you been on a demo previously?*	Prepare the question
5. Set Goal	*Set the end goal: What's the outcome you hope to get out of the demo?*	Prepare the end goal
6. Secure	Secure attendance: • Ask: *Who else do you think can benefit from... ?* • Suggest: *Should your CMO Lynn be involved... ?* • Story: *Others I've worked with have invited the...*	Review organizational profile

ADDITIONAL RESOURCES FROM

Winning by Design

Videos available on
the WbD YouTube Channel

ROM

Additional open source templates can be accessed at
www.thescienceofrevenue.com