Discovery Call Checklist and Sample Questions [Template]

Discovery call although daunting is key to building a relationship with your prospect. And as it is the very first interaction you will ever have with your client, it is an important one.

That said, a discovery call is a great opportunity to understand your prospect and introduce them to your business.

On these calls, you have one chance to make a great first impression and set the tone for the entire sales process. And sometimes it can be the difference between an open and a closed deal.

Discovery Calls are based on the SPIN selling model.
The SPIN abbreviation breaks down to:

- **S**ituation: With the help of a series of questions, sales professionals gather information on the solutions that the prospect's company is currently using.

- **P**roblem: Sales reps ask questions to discover prospects pain points and need.

- **I**mplication: While conversing with the prospect underscore why those pain points need to be resolved.

- **N**eed-Payoff: Lead prospects to find out what they might gain by choosing the solution you are offering.

Discovery Call Checklist

Before the call:

- [ ] Find some time to research about your prospect.
- [ ] Draft a discover call script that builds on your expertise
- [ ] Jot down a list of questions that aligns with the buyer journey
- [ ] Make sure you schedule calls after considering all the possible factors
- [ ] Set a clear agenda for discovery calls
- [ ] Be ready to answer questions or objections

Discovery Call Checklist

During the call:

- [ ] Open the call conversationally.
- [ ] Check your technology:
  - [ ] Turn on your Camera or Mic
  - [ ] Remember to hit record during the conversation
  - [ ] Remember to hit record
- [ ] Introduce yourself
- [ ] Build rapport (This part will be based on the research you did earlier)
- [ ] Provide helpful resources
- [ ] Get them to open and dig deeper into their pain points
- [ ] Demonstrate your industry and product knowledge
- [ ] Be ready to answer questions or objections
- [ ] Prepare to correctly frame your pricing
- [ ] Build trust with customer testimonials and proof
- [ ] Keep to your scheduled time
- [ ] Schedule your next steps

Discovery Call Checklist

After the call:

- [ ] Send a follow-up email right after your discovery call
- [ ] Build a product demo that factors in their main pain points
- [ ] Evaluate each call to improve

Sample Questions for Discovery Call

Questions That Qualify

These questions will further qualify the prospect and help them identify their goals and clarify their pain points.

These questions will tell you to understand the problems of your customers so that you will be able to solve for them in a better way.

However, keep the tone conversational and keep the flow of these questions natural.

- Prepare to correctly frame your pricing
- Build trust with customer testimonials and proof
- Tell me about your business- financial, customer-related, operational goals.
- Are you having problems in [area as it relates to the product]? What problem are you trying to solve?
- Have you tried to address it before?
- Have you purchased a similar product before?
- Be ready to answer questions or objections
- If you didn't choose a product, do you have a plan in place to address this problem?

Sample Questions for Discovery Call

Questions That Disqualify

Next, ask questions that might disqualify the prospect.

Find out more about the decision process, from budget to schedule. It's just as important to disqualify the prospect as it is to qualify them so that you don't waste your time.

Ask the following questions:

- Are there any roadblocks to implementing this plan?
- Do you have any timeline in your mind for implementation?
- Can you share your approximate budget for solving this problem and implementing our product?

You might want to set your tone less conversational and be a little firmer instead.

These are serious questions and hence, the prospects need to think carefully before answering the questions and not just throw out the first thing that comes to mind.

Sample Questions for Discovery Call

Questions that Establish Next Steps

Lastly, ask questions that move the prospect along the pipeline.

The next steps are to provide a solution and establish the next steps. However, before moving forward, be sure to ask:

- Is there anyone else who will be involved in finalizing the vendor?
- Do you have written criteria for choosing a vendor?
- Have you purchased a similar product before?
- What's the process for actually purchasing the product once you decide on it? Are there legal or procurement reviews?
- Who are the end-users of the product?
- How can I help to make this process easy?
- How will this solution help you reach your business targets and goals?
- Can I follow up with you on mm/dd?

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