Discovery Call Framework - Outbound Generated Lead

		Pre-call Research	Your Notes
		Company Name	
		Industry & Value Proposition	
		Competitors	
		Contact Name & Title	
		Company or Industry Current Event	

For a 30 Minute Call		Discovery Flow	Best Practice	Your Notes
5 minutes	☐	Time Check	*"I've got us down for _____ minutes, does that still work for you?"*	
	☐	Their goal for the call	*"I know I reached out to you, but before we get started, I have to ask.. what about my outreach interested you enough to take a meeting?"*	
	☐	Set agenda	*"First, I can share why I reached out, next I'd love to learn a bit more about X, at the end if there seems to be a good fit we usually line up tailored demo as a next step. Does that work for you?"*	
10 minutes	☐	Set Stage & Validate Research	*"___ leaders I speak with come to us looking to solve X,Y,Z {challenges}, which is why when I saw {insert compelling event that prompted your outreach} I thought it would make sense for us to connect."*	
	☐	Narrow in on problem area	*"Am I missing the mark or was my outreach timely? Which of those challenges would you say is top of mind for you?"*	
	☐	Current State	*"I'm curious, how do you address that today? Help me understand what isn't working? I always love hearing what __leaders are doing to address these areas...what have you tried?"*	
	☐	Customer Story	Relieve the tension, How have you helped a customer overcome this challenge? Must have a beginngin, middle, and end with how you helped as well as the results they experienced.	
	☐	Ideal Future State	*"...That's how we helped X customer, but I'm curious, in your perfect world, what would this solution look like? "*	
10 Minutes	☐	Priority & Tentative Timeline	*"How long have you been trying to solve for this? Interesting, is it your goal to figure this out in Q3?"*	
	☐	Posture Statement: Mini takeaway	*"It sounds like we're in the right conversation, but let me share a bit with you how we tackle these challenges to see if you feel there is a good fit, fair enough?"*	
	☐	Transition To Use of Your Value Prop	Specific to discovered challenges, have a clear value proposition conversation on where you can help them. In some organizations this means leveraging visual aids like a slide presentation.	
	☐	Lead With Best Practice & Plant Competitive Landmine	What best practice can you offer? What do your most successful customers do differently that they should be doing? Is there a differentuator you can plant knowing your competition will fall into it should they go looking?	
	☐	Business Objective	*"From your perspective, what is the business outcome we will see when we get this right?"*	
	☐	Business Impact	*"In my experience we have to get very clear on the impact to the business in order to justify the cost of our solution.. what do you think the impact would be for your company?"*	
	☐	Personal Impact	*"Other __ leaders like you that I work with tell me they personally see __ impact on their day to day. I'm curious, how would getting this right impact you?"*	
5 Minutes	☐	Pricing Range	*"It sounds like there is a great fit here. From a cost perspective, the solution we are discussing ranges from $X to $Y. If we find there is a good fit here, how would you make a purchase like this?"*	
	☐	Next Steps	Educate them how people normally buy from you, but allow them to suggest a next step. *"Normally after these initial calls we line up a demo that includes others from your team, then we usually have to get approval from your CRM admin. After that if everything looks good, we begin contracting process. But before I get too far ahead of myself, what do you think makes sense as a next step?"*	
	☐	Calendar Time	*"As I pull up my calender, who else from your team needs to be apart of this decision?"* You can also insert a recomendation here if you found a POC that would make during your pre-call research.	
	☐	Buying Process	*"Let's imagine the demo goes really well, what does your process look like from there to purchase new software?"*	
	☐	Reaffirm Timeline	*"You had mentioned ___ as an ideal timeline earlier for getting this figured out. Is that what we're working towards together?"*	

		Post Call Action Items	Best Practice
5 Minutes	☐	Next Meeting Invite	Immediatly after your call send the invite out to them for the time you agreed upon. Make sure to include a brief agenda in the description.
	☐	Collect Your Deliverables	What do you owe them? Unanswered questions? Content?
	☐	Followup Email	Create a template for followup's but personalized each one before sending. Include: what you heard their challenges are, how you can help, any deliveribles you owe them, and reiterate your next scheduled step (time and date).
5 Minutes	☐	Update CRM	Put your notes into CRM and update your Opportunity accordingly.
	☐	Social Interactions	Go to LinkedIn and add the contacts who attended. Also look for others who did not attend but who you know you will need to meet. Request to connect, follow the company account and contacts to recieve updates about them in your timeline view.
	☐	Multi-thread The Account	By either leveraging social connections on platforms like LinkedIn or by leveraging email, reach out to various people in the account you have talked with or that you know will be involved. Be careful not to step on your champions toes, but do not remain single threaded.
	☐	Schedule your next task & execute	If you have a next scheduled demo more than 3-4 days out, schedule an additional touch point in between. Ideally this is a call between the call to your champion. For example, *"Hey Prospect, I'm prepping for our next meeting and wanted to make sure I had this right... {insert something relevant from your disco call}."* Confirm agenda and and ask if there is anything else they want to make sure and cover that you should best prepare for.