

# DISCOVERY CALL FRAMEWORK

## OUTBOUND GENERATED LEAD

### Pre-call Research

- Company Name
- Industry & Value Proposition
- Competitors
- Contact Name & Title
- Company or Industry Current Event

5 MINUTES

### Time Check

#### Best Practice

"I've got us down for \_\_\_\_\_ minutes, does that still work for you?"

Your Notes

### Their Goal For The Call

#### Best Practice

"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?"

Your Notes

### Set Agenda

#### Best Practice

"First, I can share why I reached out, next I'd love to learn a bit more about XX, 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?"

Your Notes

10 MINUTES

### Set Stage & Validate Research

#### Best Practice

"\_\_\_ 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."

Your Notes

### Narrow in on problem area

#### Best Practice

"Am I missing the mark or was my outreach timely? Which of those challenges would you say is top of mind for you?"

Your Notes

### Current State

#### Best Practice

"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?"

Your Notes

### Customer Story

#### Best Practice

Relieve the tension, How have you helped a customer overcome this challenge? Must have a beginning, middle, and end with how you helped as well as the results they experienced.

Your Notes

### Ideal Future State

#### Best Practice

" ... That's how we helped X customer, but I'm curious, in your perfect world, what would this solution look like?"

Your Notes



10 MINUTES

**Priority & Tentative Timeline**

**Best Practice**

"How long have you been trying to solve for this? Interesting, is it your goal to figure this out in Q3?"

**Your Notes**

**Posture Statement: Mini takeaway**

**Best Practice**

"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?"

**Your Notes**

**Transition To Use of Your Value Prop**

**Best Practice**

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.

**Your Notes**

**Lead With Best Practice & Plant Competitive Landmine**

**Best Practice**

What do your most successful customers do differently that they should be doing? Is there a differentiator you can plant knowing your competition will fall into it should they go looking?

**Your Notes**

**Business Objective**

**Best Practice**

"From your perspective, what is the business outcome we will see when we get this right?"

**Your Notes**

**Business Impact**

**Best Practice**

"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?"

**Your Notes**

**Personal Impact**

**Best Practice**

"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?"

**Your Notes**

5 MINUTES

**Pricing Range**

**Best Practice**

"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, how would you make a purchase like this?"

**Your Notes**

**Next Steps**

**Best Practice**

Educate on how people normally buy, but allow them to suggest a next step. "Normally after these initial calls we line up a demo that includes others from your team. After that, we begin the contracting process. But before I get too far ahead of myself, what do you think makes sense as a next step?"

**Your Notes**

**Calendar Time**

**Best Practice**

"As I pull up my calendar, who else from your team needs to be apart of this decision?" You can also insert a recommendation here if you found a POC that would make during your pre-call research.

**Your Notes**





5 MINUTES

**Buying Process**

**Best Practice**  
"Let's imagine the demo goes really well, what does your process look like from there to purchase new software?"

**Your Notes**

**Reaffirm Timeline**

**Best Practice**  
"You had mentioned\_ as an ideal timeline earlier for getting this figured out. Is that what we're working towards together?"

**Your Notes**

POST CALL (5 MINUTES)

**Next Meeting Invite**

**Best Practice**  
Immediately 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.

**Your Notes**

**Collect Your Deliverables**

**Best Practice**  
What do you owe them?  
Unanswered questions? Content?

**Your Notes**

**Followup Email**

**Best Practice**  
Create a template for followup but personalized each one. Include: what you heard their challenges are, how you can help, any deliverables you owe them, and reiterate your next scheduled step (time and date).

**Your Notes**

**Update CRM**

**Best Practice**  
Put your notes into CRM and update your Opportunity accordingly

**Your Notes**

POST CALL (5 MINUTES)

**Social Interactions**

**Best Practice**  
Go to LinkedIn and add people who attended. Also look for others who did not attend but who you know you will need to meet. Request to connect and follow the company.

**Your Notes**

**Multi-Thread The Account**

**Best Practice**  
Leverage social connections on platforms or 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.

**Your Notes**

**Schedule Your Next Task & Execute**

**Best Practice**  
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 with your champion. Confirm agenda and ask if there is anything else they want to make sure and cover that you should best prepare for.

**Your Notes**

