INBOUND DISCOVERY CALL FRAMEWORK

☐ **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
"Before I set an agenda, I'd love to hear your goal for today's call."

Your Notes

☐ Set Agenda
Best Practice
"Let's first discuss what prompted your interest, then I can share a bit about us, and if there is a good fit as a next step we will line up a tailored demo. Is that fair? Anything you want to add?"

Your Notes

10 MINUTES

☐ Situational Question
Best Practice
"What prompted your initial interest?"

Your Notes

☐ Current State
Best Practice
"How do you do that today? What has been working well? Help me understand what isn't working? What have you tried to address that?"

Your Notes

☐ Ideal Future State
Best Practice
"I'm curious, in a perfect world, what would this solution look like? Given your current priorities, where would you say this falls on the list?"

Your Notes

10 MINUTES

☐ Tentative Timeline Check
Best Practice
"I'm curious, if we were to deliver a solution to help you tackle this, what would be your timeline for implementing?"

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 on how we tackle these challenges to see if you feel there is a good fit, is that fair?"

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

10 MINUTES

☐ Plant Competitive Landmine & Best Practice

Best Practice

What best practice can you share that is also a differentiator you have? Plant this so that you're a consultant and so your competition will fall into it.

Your Notes

☐ Customer Story

Best Practice

Relieve the tension and relate to their challenge with a customer story.

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. Is that something you have set aside for this project?"

Your Notes

☐ Next Steps

Best Practice

"From here we usually line up a tailored demo together... but what do you think makes sense as a next step?"

Your Notes

☐ Calendar Time

Best Practice

"As I pull up my calender, who else from your team needs to be apart of this decision?"

Your Notes

☐ Buying Process

Best Practice

"Let's say 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 together towards?"

Your Notes

POST CALL ACTION ITEMS

☐ 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's but personalized each one before sending. Include: what you heard their challenges are, how you can help, any deliverables you owe them, and reiterate your next scheduled step.

Your Notes

☐ Update CRM

Best Practice

Put your notes into CRM and update your Opportunity accordingly.

Your Notes

☐ Social Interactions

Best Practice

Go to LinkedIn and add the people 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 receive updates about them in your timeline view.

Your Notes

☐ Multi-thread The Account

Best Practice

By leveraging social connections, 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 between you and 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.

Your Notes