Discovery Call

Checklist & Template

Use this template as a foundation for your own discovery call script to boost your sales engagement and improve your chances of moving deals forward.

nextiva

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1 Pre-Call Preparation

☐ Research the Prospect

- ☐ Company size, industry, and recent news
- ☐ LinkedIn profiles of attendees
- ☐ Current tools/solutions they might be using
- ☐ Common pain points in their industry
- ☐ Potential trigger events that prompted their interest

☐ Call Objective

- ☐ [Define what you want to accomplish in this call]

☐ Value Proposition

- ☐ [How your solution specifically helps companies like theirs]

2 Call Structure

Introduction (3-5 minutes)

- [ ] Introduce yourself and company
- [ ] Express appreciation for their time
- [ ] Confirm the time they have available for the call:

> *"I have us scheduled for 30 minutes. Does that still work for you?"*

- [ ] Present agenda and get agreement:

> *"Here's what I'd like to cover today..."*

- [ ] Set expectations:

> *"My goal is to learn about your needs to determine if and how we might be able to help."*

Rapport Building (2-3 minutes)

- [ ] Reference research:

> *"I noticed your company recently..."*

- [ ] Ask about their role:

> *"Could you tell me about your responsibilities at [Company]?"*

- [ ] Confirm understanding of their business:

> *"To make sure I understand your business correctly..."*

Situation Discovery (10-15 minutes)

- [ ] Current state questions:

  - *"What tools or systems are you currently using for [relevant function]?"*
  - *"What's working well with your current setup?"*
  - *"What aspects could be improved?"*

- [ ] Goals and challenges questions:

  - *"What goals are you trying to reach in this area?"*
  - *"What challenges are preventing you from achieving those goals?"*
  - *"What would success look like for you in terms of [specific metric]?"*
  - *"What's the impact on your business if these challenges aren't addressed?"*

- [ ] Decision process questions:

  - *"Do you have a timeline in mind for implementing a new solution?"*
  - *"Is there a budget allocated for this project?"*
  - *"Who else will be involved in the decision-making process?"*
  - *"What criteria will you use to evaluate potential solutions?"*

Solution Alignment (5 minutes)

- [ ] Summarize key pain points you've heard
- [ ] Briefly explain how your solution addresses their specific challenges
- [ ] Share a relevant success story or case study from a similar customer
- [ ] Ask a validation question:

> ***"Based on what I've shared, does this sound like it might address your needs?"***

Next Steps (3-5 minutes)

- [ ] Propose specific next action:

> ***"Based on our conversation, I think the best next step would be..."***

- [ ] Schedule a follow-up with a clear purpose
- [ ] Set expectations for what will happen between now and the next meeting
- [ ] Thank them for their time and insights

3 Post-Call Actions

☐ Send a Follow-Up Email With:

- ☐ Thank you note
- ☐ Summary of key discussion points
- ☐ Confirmation of next steps and timeline
- ☐ Any promised resources or information
- ☐ Potential trigger events that prompted their interest

☐ Update CRM With:

- ☐ Call notes
- ☐ Pain points discovered
- ☐ Opportunity assessment
- ☐ Follow-up tasks and reminders

4 Key Discovery Questions

1. "What goals are you trying to reach?"
2. "What challenges are keeping you from achieving those goals?"
3. "What would success look like in terms of [metric]?"
4. "What's the impact if these challenges aren't addressed?"
5. "What tools are you currently using?"
6. "Do you have a timeframe for implementing a solution?"
7. "Is there a budget set aside for this project?"
8. "Who else will be involved in evaluating solutions?"
9. "What questions do you have about our solution?"
10. "When can we schedule our next conversation?"

5 Discovery Call Script Template

Introduction

REP

*"Hi **[Prospect's Name]**! I'm **[Your Name]** from **[Your Company]**.*
I appreciate you taking some time to chat.
How are you doing today?"

[Allow the prospect to respond.]

REP

*"Great to hear that. I know we touched base over **[email/previous call]** about exploring how we might help with **[specific business challenge]**.*

I've blocked out about 30 minutes. Does that still work for you?"

[Confirm timing.]

REP

"Perfect. Here's what I'm thinking for our conversation. I'd love to:

- *Learn more about your role.*
- *Understand the challenges your team is facing.*
- *Explore your goals.*
- *Discuss how we might be able to help.*

How does that sound?"

[Get confirmation.]

Building Rapport and Understanding the Business

REP

*"So, **[Prospect's Name]**, tell me a bit about your role at **[Company Name]**. What are your primary responsibilities, and how long have you been with the organization?"*

[Listen to response.]

REP

*"That's helpful context, thank you. I did some research on **[Company Name]**, but I'd love to hear from you — how would you describe what makes your organization unique in the **[Industry]** space?"*

[Listen and take notes.]

Uncovering Pain Points and Goals

REP

"What goals are you and your team currently focused on achieving this year?"

[Listen carefully and take detailed notes.]

REP

*What are the key goals you and your team are focused on achieving **[this quarter/this year]**?"*

[Listen deeply to understand pain points.]

REP

*"Those sound like **[impressive/important]** targets. I'm curious — what challenges are making it tough to hit those goals?"*

[Capture their success metrics.]

REP

"If we were to look at success for you, what would that ideally look like? Are there specific metrics you're hoping to improve?"

[Learn success criteria.]

REP

"And just to dig a bit deeper — what's at stake if these challenges continue unaddressed?"

[Listen to understand urgency and consequences.]

Current Situation Assessment

REP

*"I'd love to understand your current setup. What tools are you using right now for **[specific business function, such as customer communication, call routing, etc.]**?"*

[Take notes on current solutions.]

REP

"How's that working out for you? What's going well, and what's causing friction?"

[Listen to understand satisfaction with current solutions.]

Decision Process and Timeline

REP

*"Are you looking to implement a new solution **[in the near term/this quarter/this year]**?"*

[Note their timeline.]

REP

"Got it. Have you allocated a budget for addressing these challenges?"

[Note budget information if shared.]

REP

"Who else in your organization would be involved in evaluating potential solutions?"

[Document key stakeholders.]

Solution Connection

REP

*"Based on everything you've shared, I think our **[Product/Service Name]** could be a great fit. We've actually helped companies similar to **[Company Name]** solve challenges like **[specific pain point]** by **[brief solution overview]**."*

"Would you be interested in a quick walkthrough of how our solution might specifically address the challenges you're experiencing?"

[If yes, provide a brief, relevant explanation focused on their specific pain points.]

Addressing Questions and Next Steps

REP

"What questions do you have for me? I want to make sure we're addressing your specific needs."

[Address questions thoroughly.]

*"Given our conversation, I think the most valuable next step would be **[scheduling a demo/technical call/sending a proposal]**. Does **[specific date/time]** work for you and your team?"*

[Confirm next steps and timing.]

Wrap-Up

REP

*"**[Prospect's Name]**, thank you so much for your time today. I feel like we've uncovered some really interesting insights about your business challenges. Just to recap, we'll **[specific next step]** on **[date/time]**. I'll send a calendar invite with a summary of today's discussion. Anything else you'd like me to include?"*

[Address any final questions.]

"Wonderful! Talk to you soon, and have a great rest of your day."